BEACON North Carolina Office of the State Controller

BEACON SAP Workflow

WF220

Slide 1

Notes

Welcome to *WF220 BEACON SAP Workflow* training. This course is designed for individuals working at State agencies who support the Workflow approval process.

SAP Training — Welcome and Introductions

BEACON North Carolina Office of the State Controller

- Welcome to SAP Workflow for Agencies course.
  - Introductions
  - Sign-in sheet
  - Tent cards
  - Restrooms
  - Breaks
  - Parking lot
  - Classroom etiquette
    - Cell phones off
    - No side conversations

Slide 2

Notes

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

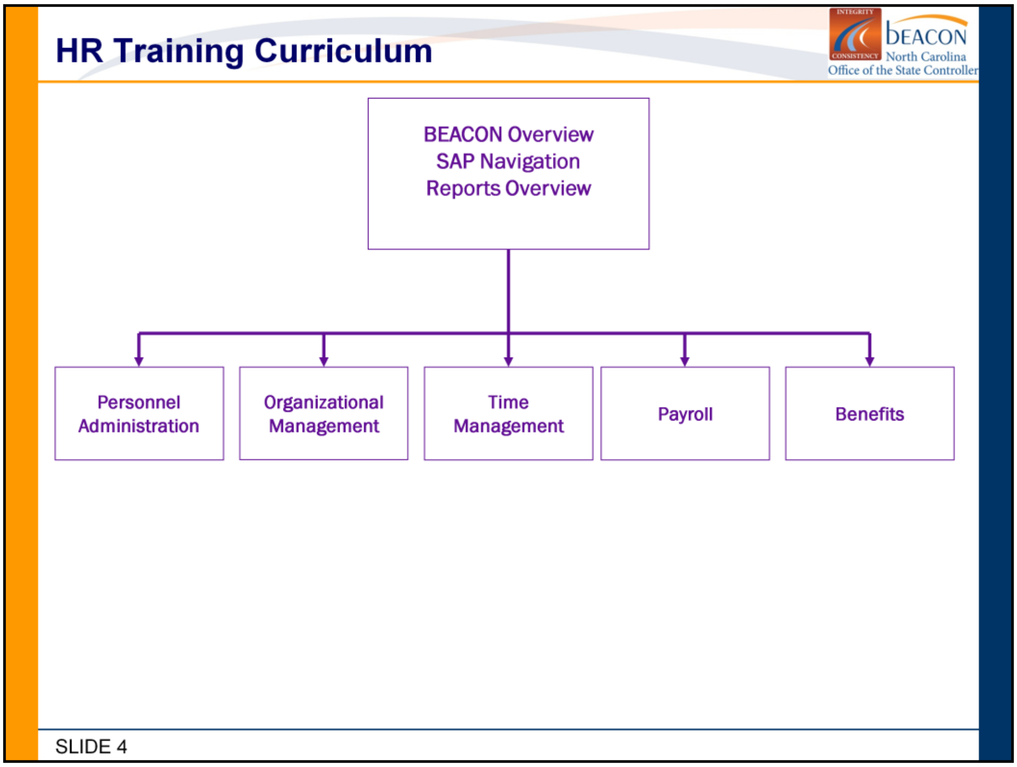
Prerequisites

- Prerequisites for all:
  - BEACON Overview, BC100
  - SAP Basic Navigation, BC110
- If you are an Initiator, you need to take the following courses in your area (OM or PA):
  - Organizational Management Overview, OM200
  - Organizational Management for Agencies, OM210
  - Personnel Administration Overview, PA200
  - Personnel Administration Terms Concepts and Display Data, PA210
  - Create and Maintain Employee Data, PA 310
- If you are a budget Approver, you need to take:
  - Agency Funding Approval OM250

Slide 3

Notes

The prerequisites are listed above. Attending these prerequisites ensures that you are adequately prepared to learn the new processes, concepts, and data entry skills that are covered in this course.



Notes

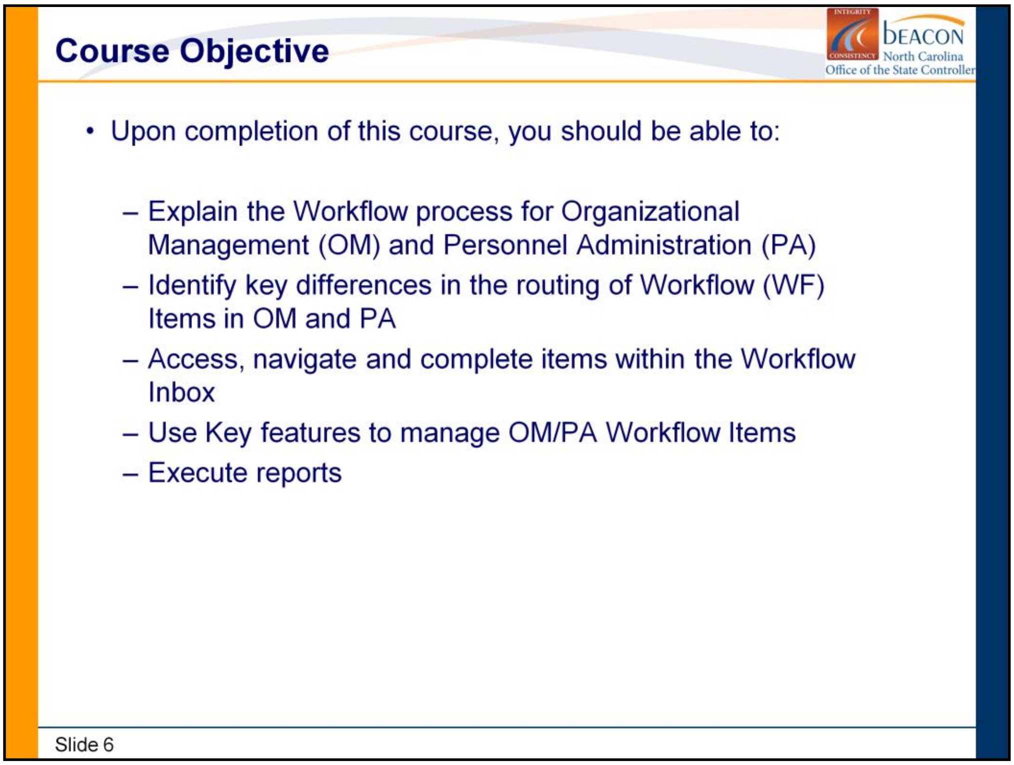
The BEACON HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the module/s.

Course Map

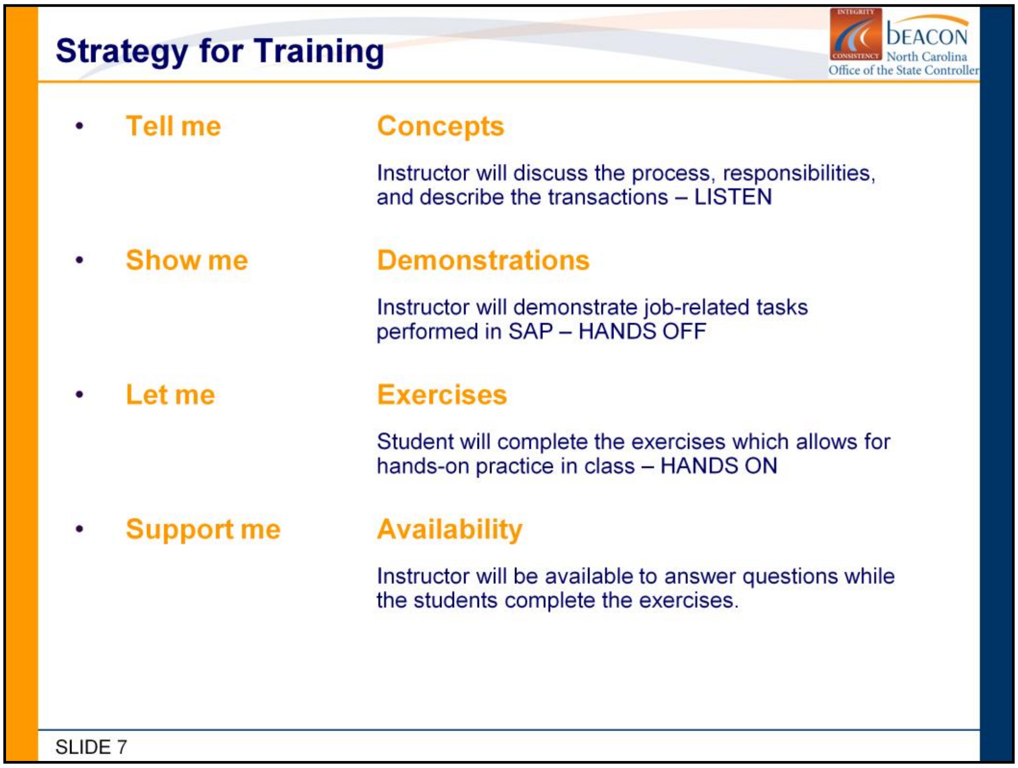
- Lesson 1: Workflow Overview
- Lesson 2: Access and Navigate the Workflow Inbox and Outbox
- Lesson 3: Approve OM Workflow PCRs
- Lesson 4: Approve PA Workflow PCRs
- Lesson 5: Workflow Report
- Lesson 6: Course Review

Slide 5

Notes

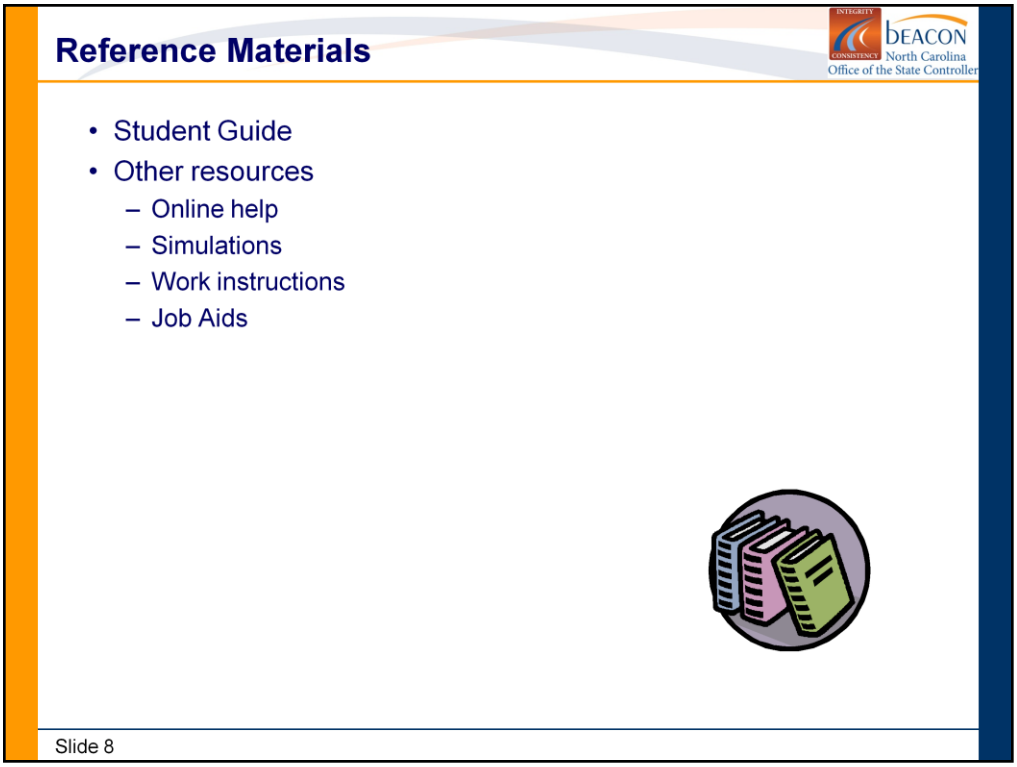

Course Objective
BEACON
North Carolina
Office of the State Controller
• Upon completion of this course, you should be able to:
– Explain the Workflow process for Organizational Management (OM) and Personnel Administration (PA)
– Identify key differences in the routing of Workflow (WF) Items in OM and PA
– Access, navigate and complete items within the Workflow Inbox
– Use Key features to manage OM/PA Workflow Items
– Execute reports
Slide 6

Notes



Notes

The *BEACON SAP Workflow* student guide provides a copy of the PowerPoint presentation used in the classroom training. Observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment.



Notes

References (Job Aids)

In addition to the Student Guide these quick references are available:

- How to Access the Inbox
- How to Check the Status of a Request
- OM SAP Routing Table
- PA SAP Routing Table

These references are also available online through the BEACON University web site.

The data presented in this course is representative of your work environment. However, the Action scenarios and exercises included in the course have been created solely for the purpose of training.

Other resources

BEACON Online help:

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

Online help

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures
- Includes links to simulations

To access BEACON Help, select the **Help > BEACON Help** menu option from any SAP ERP screen.

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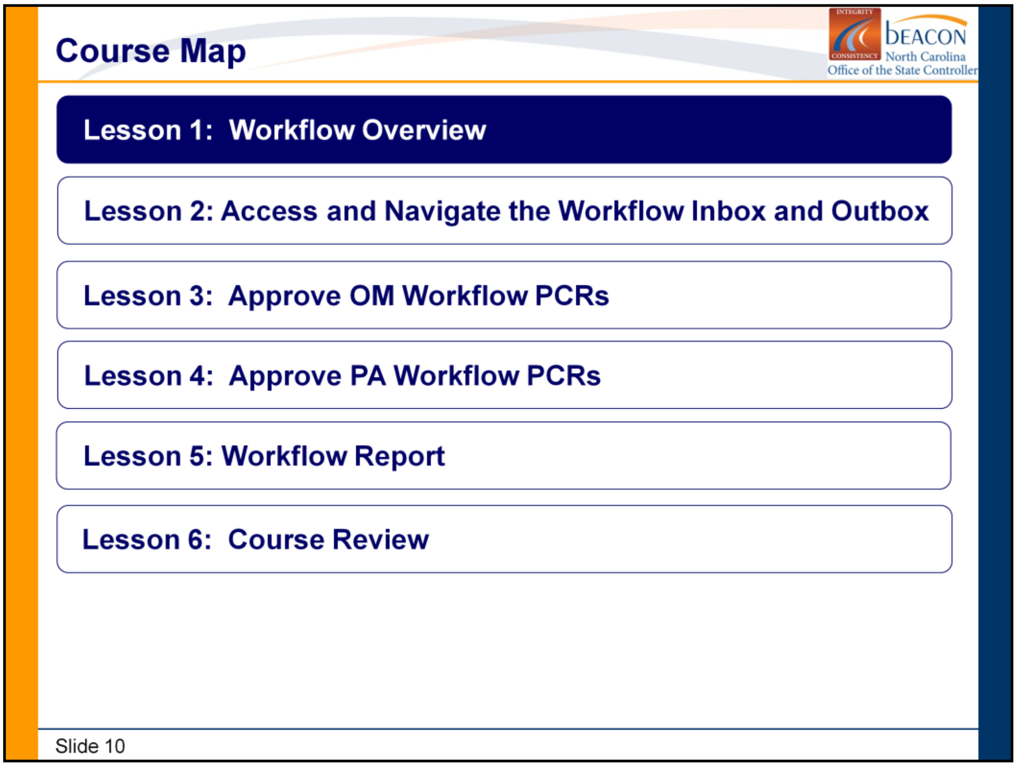
Notes


Course Map
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Notes

Lesson 1 Objectives

- Upon completion of this lesson, you should be able to:
  - Explain the purpose of Workflow
  - Define key Workflow terms
  - Identify key changes in the approval process
  - Describe the differences between the OM and PA Workflow process
  - Identify how to trouble shoot PCRs

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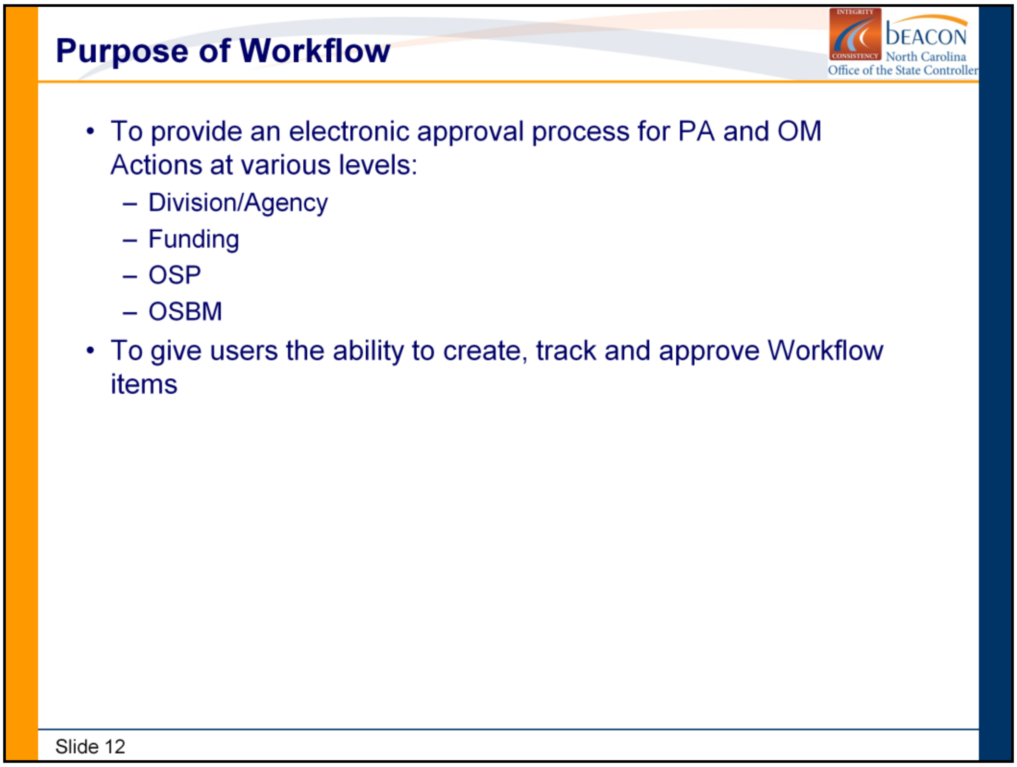
Notes



Notes

In some ways, BEACON Workflow is used to replicate the electronic forms for processing former PMIS PD105s (Personnel Actions) and PD118s (Position Actions).

Key Terms (1 of 3)

- Action – a new or change to a position or personnel record
- Documents - SAP messages that provide an audit trail for every Workflow item that has been created
- Priority - a setting that indicates the urgency of the Workflow item based on the business requirement
  - The Workflow default is 5 (Medium)
- Initiator – the person who enters the Action for PA or OM and starts the Workflow process
- Routing Table – a list of Actions/reasons and the logic to support the approval process

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Notes

Action: This term is used in both PA and OM to indicate a new or change to an existing position or employee.

Documents: A documents option is contained in both the Inbox and Outbox. Documents are BEACON's way of tracking all transactions that take place within the system. You will not use documents very often.

Priority: The Initiator of a Workflow item cannot change the default setting, which is medium. Only Approvers can change the setting.

Initiator: The OM or PA user who enters the data for either an OM or PA Action. In PA, the Initiator will ultimately enter the data for the Action into the employee's BEACON SAP personnel record.

Routing Tables: Both OM and PA have a custom table created for the State of North Carolina within SAP to hold the list of actions/reasons and logic to support the approval process for positions and personnel. The table identifies which Action goes to which approval level.

Key Terms (2 of 3)

- Workflow Tracker – link that shows where the Workflow item has already been and where it will go for approval
- Workflow Header - link that displays the data used in the Workflow item—either the PA or OM request form
- Workflow Log – more detailed information about the approval levels and the Approver names at each of those levels
- PCR – Personnel (or Position) Change Request

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Notes

Workflow Tracker: a link that will show you the name of the Step, Status, Result, Time & Agent for each Workflow item. The Workflow Tracker shows who initiated, who approved, and who the next approvers are in the process.

Workflow Header: the top portion of the Workflow Tracker link that displays the data that was entered by the Initiator for the Workflow item. The Workflow Header answers this question, “What data was used to execute this Workflow item?”.

Workflow Log: a more detailed view of the individual steps the document goes through within the Workflow process (detailed Workflow Tracker). The Workflow Log answers the question, “Who has the Workflow item in his/her inbox?”.

PCR: A Personnel or Position Change Request (PCR) is a number assigned to each Workflow item. The PCR can be used to identify and track a Workflow item.

Currently BEACON is only using Personnel Change Request forms within the Workflow environment. In the future BEACON may implement additional approval Workflow processes (not to include, but as an example, Vendor Invoice approvals, Purchase Order approvals, etc.). These additional Workflow processes would use a term other than PCR.

Key Terms (3 of 3)

BEACON North Carolina Office of the State Controller

- Approver – the person(s) assigned to positions designated to approve or reject Workflow items
- Substitutions – a person who can temporarily act for an Initiator or Approver who is absent

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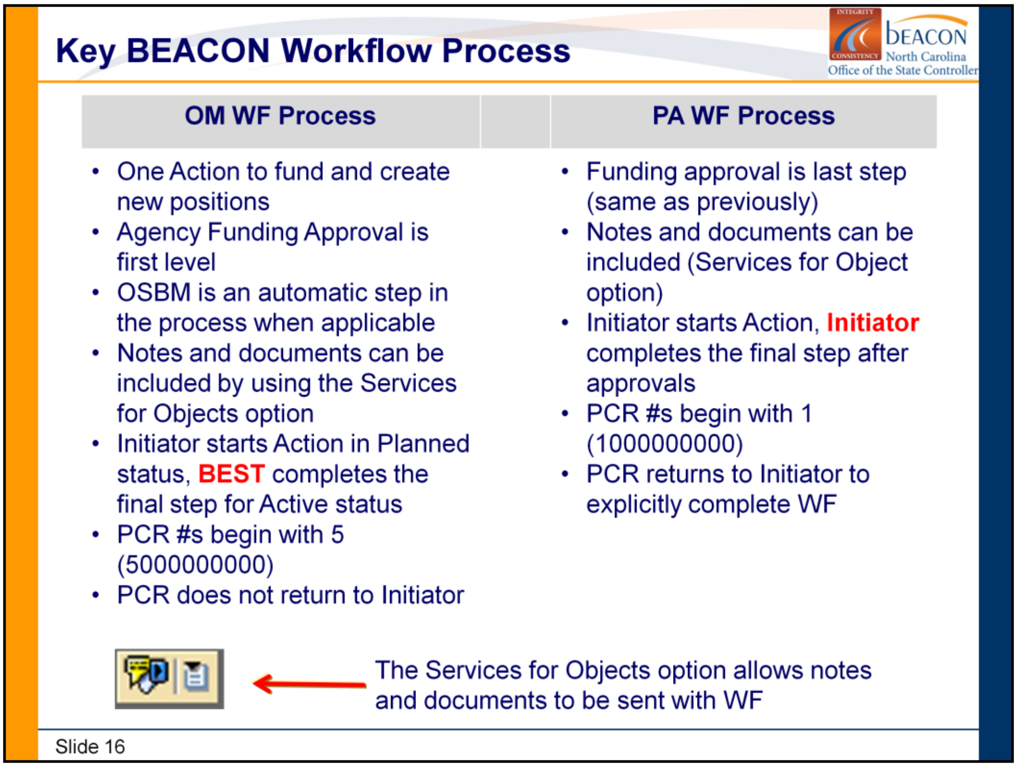
Notes

Approver: Several positions are assigned with approval status at various levels within the organization. The security access assigned to the position determines if the position holder has approval authority for PA, OM or both. The authority to approve belongs to the position, not the person holding the position. When the person leaves the position, he or she may no longer have approval authority.

Generally, there are at least two Approvers assigned to each level so that when the Initiator executes Workflow, the PCR is sent to the Inbox of all of the Approvers at that level. This allows the approval process to continue if one of the Approvers is out of the office for a period of time.

Substitutions: Agencies can have a substitute assigned when an individual is out. The Agency must submit a request to BEST Shared Services (BEST). The user that is substituting must have the same security role(s) as the one for whom the user is being substituted. The Substitute will see all of the items in the Inbox of the individual for which he or she is substituting.



OM BEACON Process

Notes

Funding a position and *establishing* are now combined into one Action. During WF, the positions are in Planned Status.

OSBM approval is a step in the BEACON new position Action Workflow process; therefore, it is no longer necessary to have OSBM approve the funding of a position in a separate form prior to creating the new position (establish position action). OSBM Funding Approval is not required if creating new positions as *temporary*.

When the Initiator executes OM Workflow, the first approval level in BEACON is the Agency Funding Approval (Budget Approval). In the previous system, this was the last approval in the process.

The Services for Objects option allows notes and attachments (Word, Excel, Notepad) to be included with the WF PCR. All Approvers at the next levels (unless marked private) can view the notes or attachments. Only the creator of the private note can view it.

After all approvals are final, the OM Workflow item is sent to BEST. While BEST is not an Approver, there are certain functions they must perform to move the position from Planned status to Active.

PA BEACON Process

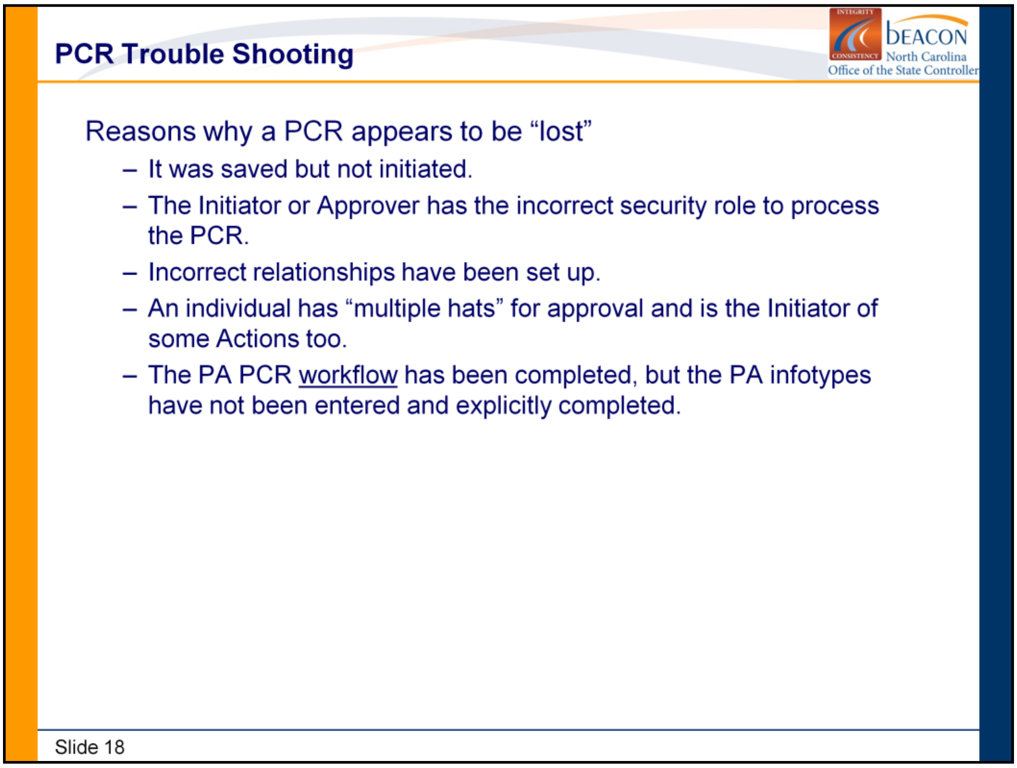
The Initiator (not BEST) completes the PA Action.

The Agency Funding Approver is last (as was true previously).

Services for Objects is also available in PA which allows notes and documents to be included with the PCR.

Notes

The above list shows the different levels that an OM or PA Action may be sent for approval. The OM/PA Routing Tables were set up to determine how the PCR is routed.



Notes

If the Initiator merely saved the PCR and did not click the Initiate Workflow button, the PCR stays in the Inbox of the Initiator. Therefore an Approver who is waiting to see the PCR in the Approver Inbox will not be able to do so. If neither the Initiator nor the Approver can see the PCR, contact BEST.

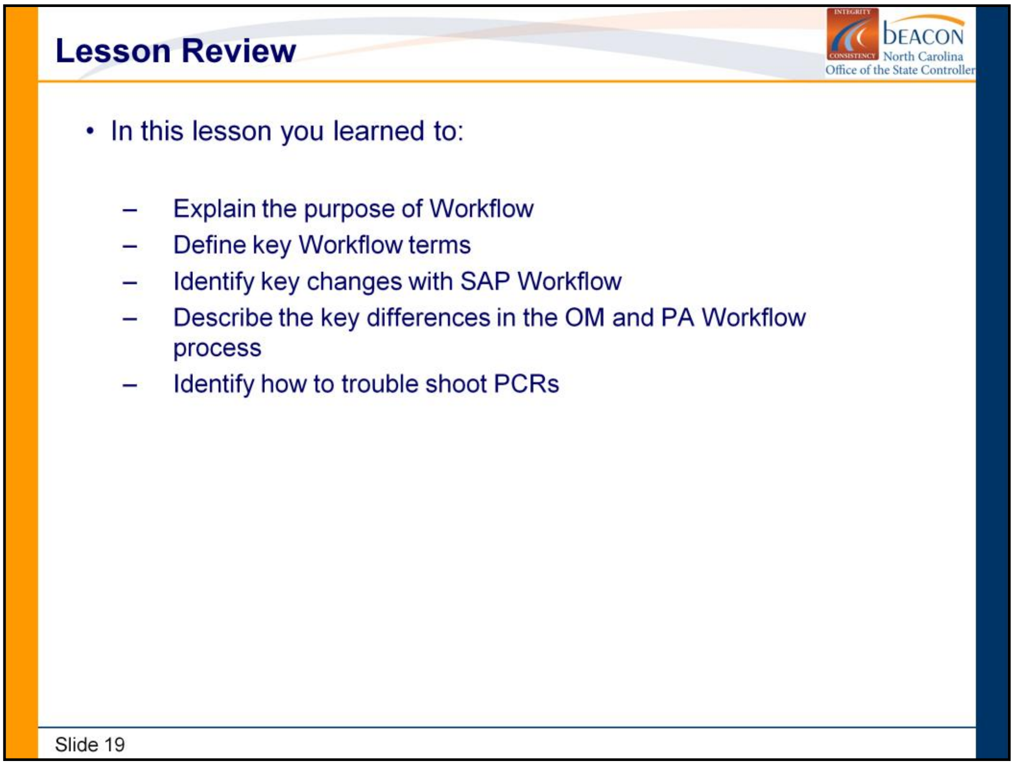
The Initiator or Approver has incorrect security roles to process a PCR.

If the workflow tracker indicates "no user ID", or "vacant" then an incorrect relationship may have been set up or the Approver position is unoccupied BEST can access the table routing to determine if there is an error in the relationship.

If a user is an Initiator as well as an Approver, it can sometimes be confusing. That is because the same PCR will leave the Inbox of the Initiator role and be sent to the Inbox of the Approver role (which to the employee is the same Inbox).

In PA, the Initiator has to click a "Completed Workflow Item" button when the personnel file changes have been completed. In some cases, the Initiator may have inadvertently clicked the button prematurely.

If a user accidently backs out of an Action without processing all infotypes, BEACON may assume the Action is complete when it is not.


Lesson Review
BEACON North Carolina Office of the State Controller
• In this lesson you learned to:
– Explain the purpose of Workflow
– Define key Workflow terms
– Identify key changes with SAP Workflow
– Describe the key differences in the OM and PA Workflow process
– Identify how to trouble shoot PCRs
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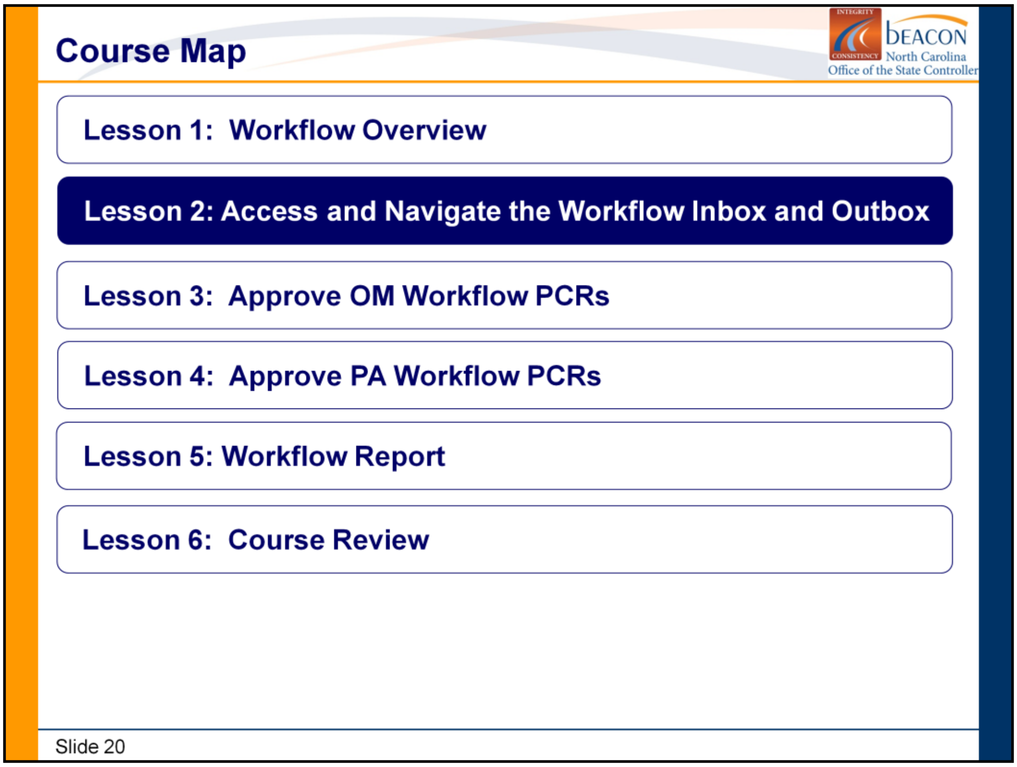
Notes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Notes

Lesson 2 Objectives

BEACON North Carolina Office of the State Controller

After completing this lesson, you should be able to:

- Access Workflow Inbox in transaction code SBWP
- Use the different Folders and options in Inbox and Outbox
- Identify the Workflow Item Statuses
- Identify the priority levels that can be set for a PCR
- Open a Workflow Item
- Review the Workflow Log
- Use the Workflow Tracker
- Use the Workflow Header

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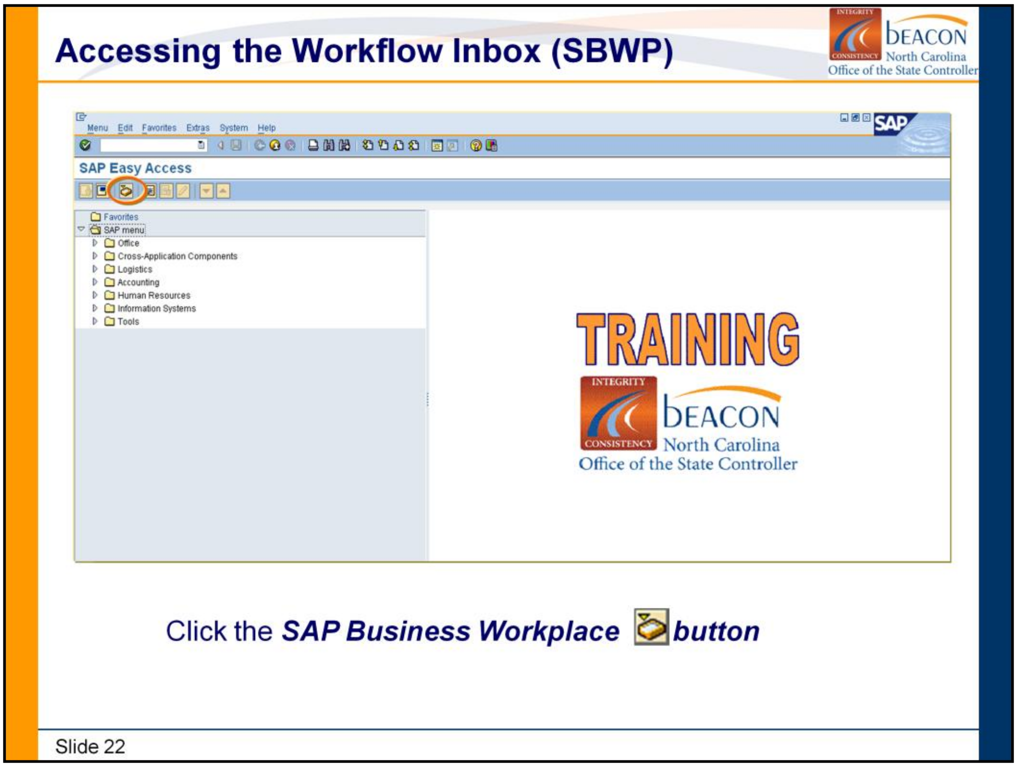
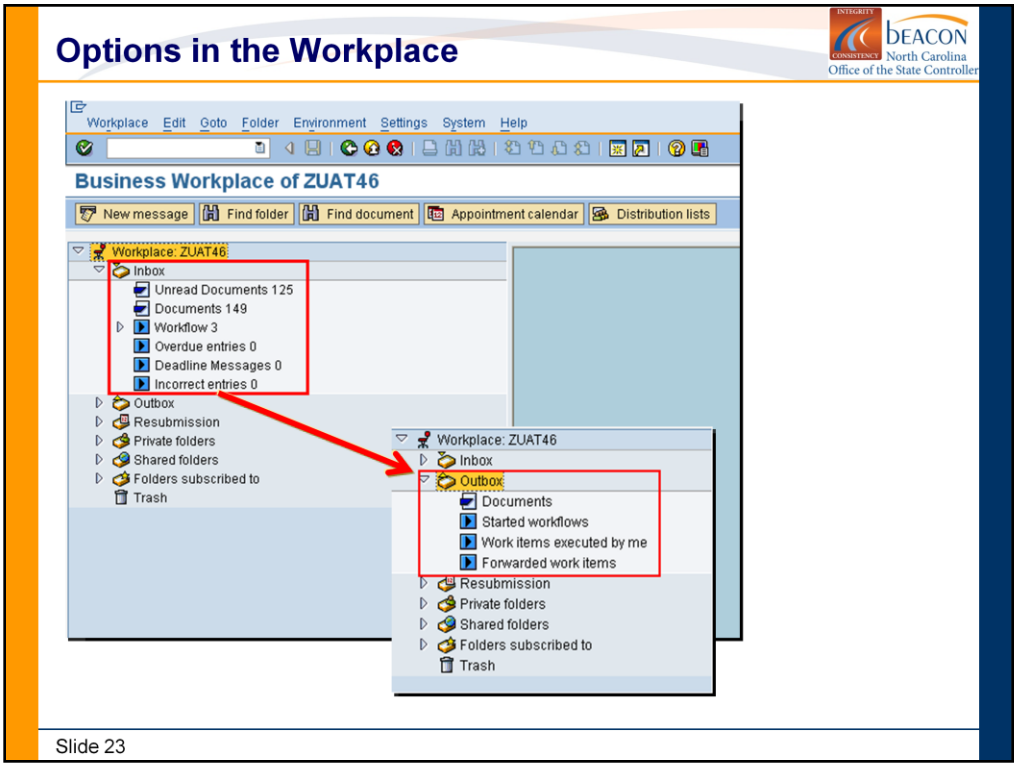
Notes



Notes

An Approver accesses the Workflow PCRs that have been sent for him or her to take Action on via the Workflow option in the Inbox.

The Inbox is accessed either from the Easy Access screen using the Business Workplace button, or by entering SBWP in the Command field.



Notes

The Workplace is organized by folders. You will mainly use the Inbox and Outbox folders.

Documents: Both the Inbox and Outbox have Documents. As noted previously, BEACON SAP creates a document for every entry made, like an audit trail. Documents are also generated as notifications to approvers when a PCR is rejected. The two options for documents are Unread Documents (documents that have not already been read) and Documents (documents that are new and ready to read). In BEACON, documents are informational only.

Inbox

Workflow: This option will hold all the BEACON WF PCRs that have been sent to you and all Approvers at your approval level for processing.

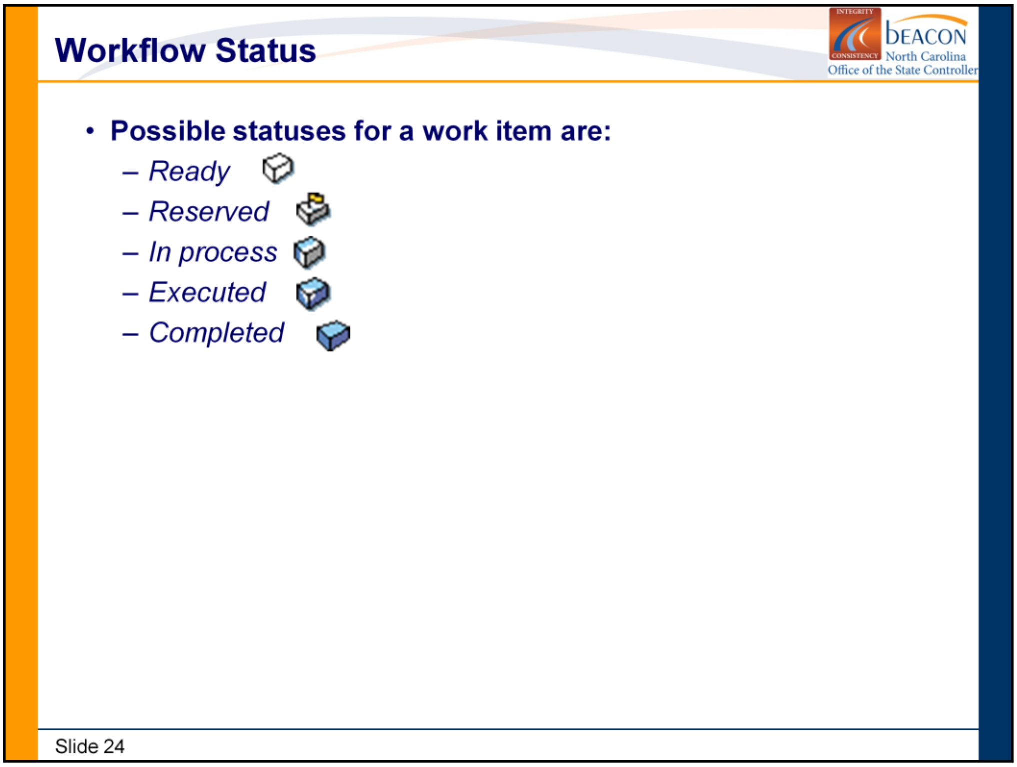
The following Inbox options are <u>not</u> being used: Overdue entries, Deadline Messages, and Incorrect entries.

Outbox

Started Workflows: Workflow Items for which you were the Initiator.

Work items executed by me: Work Items that you have processed by either approving, cancelling, or returning to the Initiator.

The *Forwarded work items* Outbox option is <u>not</u> being used.



Notes

A graphical icon shows the status of a PCR at a glance. There are five possible statuses for a PCR:

Ready: The PCR is released to the Inbox of the next approval level and is ready for an Approver to take action.

Reserved: The PCR has been reserved by an Approver which removes the PCR from the Inbox of all other Approvers at that level. The PCR is only displayed in the Workflow inbox of Approver who reserved it.

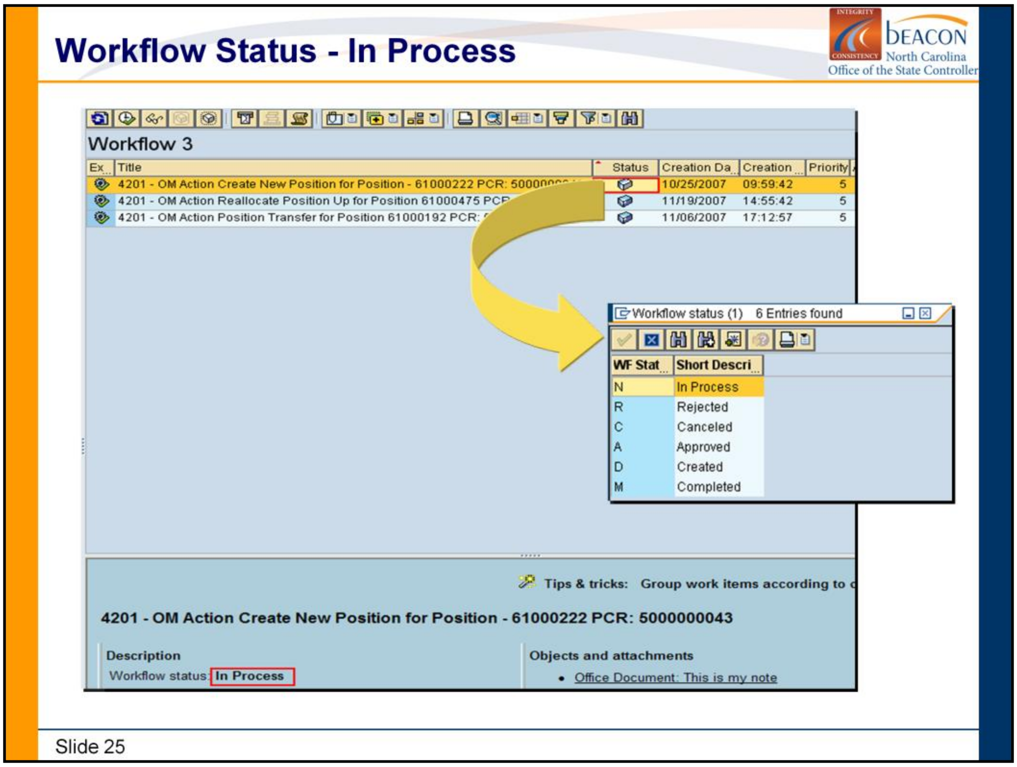
In Process: A PCR assumes this status if:

- It is being executed by an Approver.
- It is waiting for its terminating event.
- The execution is terminated by an Approver.
- The execution has been terminated with a temporary exception for which no subsequent steps have been modeled.

In Process status means the Workflow system has not yet recognized the point at which processing is completed.   For example, all approvals have not occurred or approvals have occurred but the final processing of the PA or OM action has not occurred.

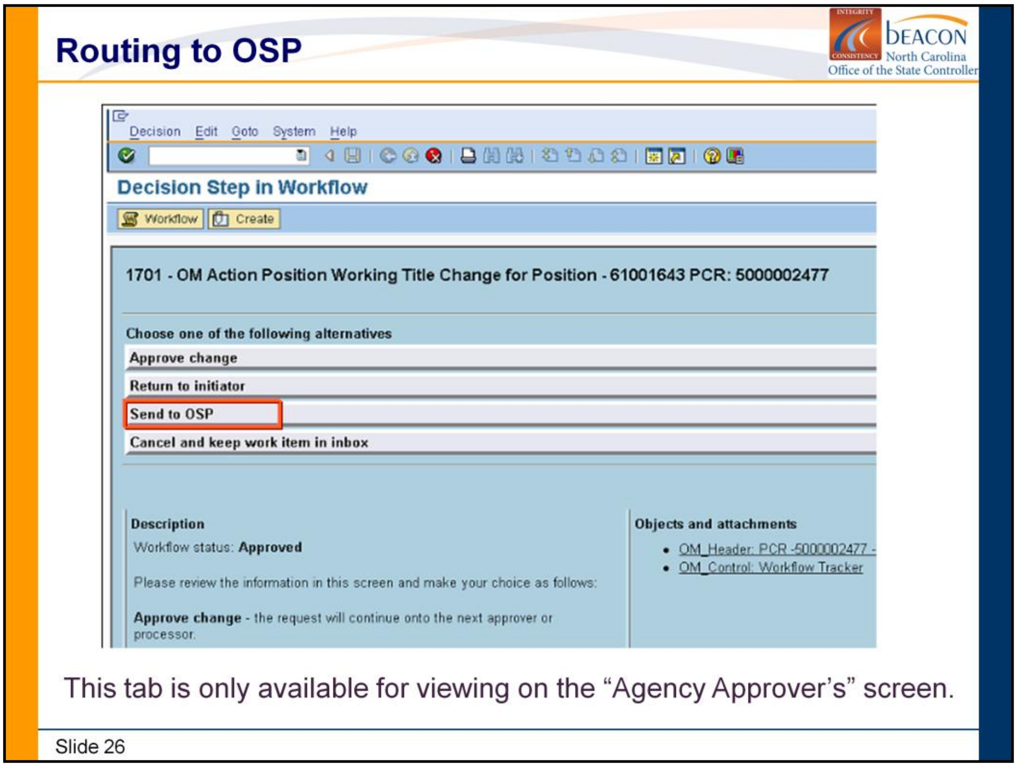
Executed: The PCR is awaiting a specific confirmation of its completion which is required. A PCR with *executed* status can be executed several times until it is set to the *Completed* status in the Business Workplace.

Completed: The execution of the PCR is completed and is no longer displayed in the Workflow inbox of the Business Workplace.   This means that the PA or OM Action is complete and records are active in BEACON.



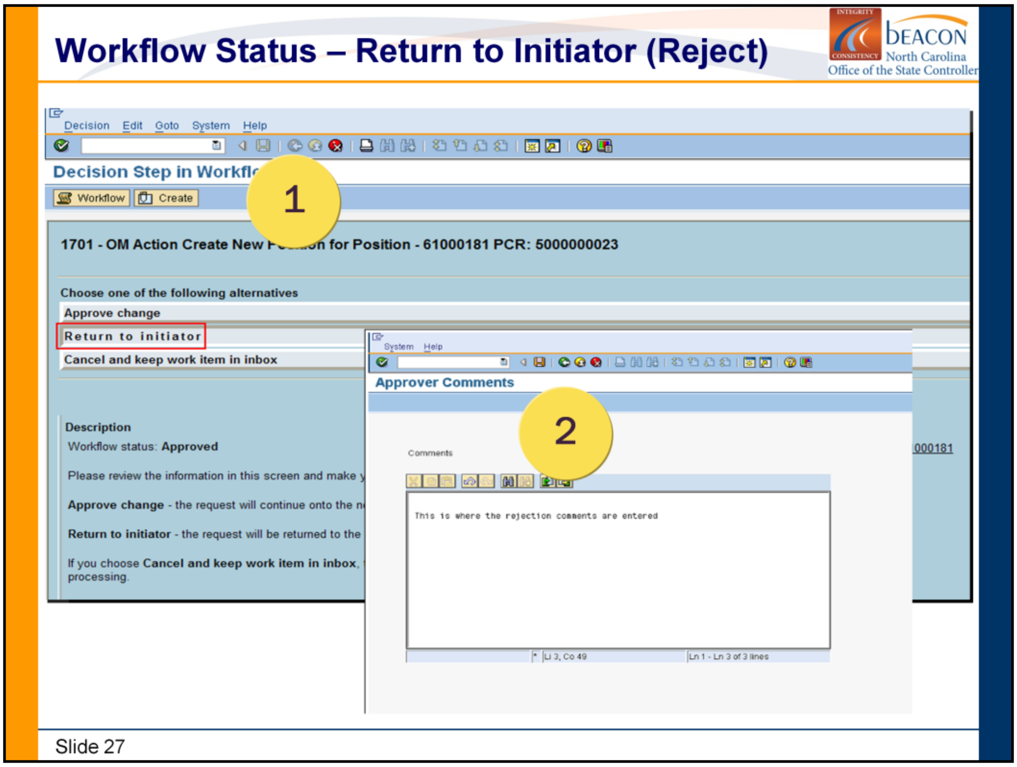
Notes

- After an Initiator initiates Workflow, the status is updated to "**N**" for in process.
- After an Approver approves the PCR, the status is set to "**A**" for approved and will remain at "A" for all approval levels unless an Approver returns (rejects), reserves, or cancels the PCR.
- When an Approver returns (rejects) a PCR, the status is changed to "**R**" for rejected. The PCR is automatically sent back to the Inbox of the Initiator.
- If the initiator accepts the rejection of an action, the Workflow status will change to "**C**" for canceled.
- For OM Actions, after BEST Shared Services processes the approved PCR, the status is changed to "**M**" for completed.
- For OM if an Action is rejected, BEST Shared Services processes the canceled action. This changes the OM Action in planned status to rejected status and the WF status is changed to "**M**" for completed.



Notes

IMPORTANT NOTE: Routing to OSP is not an automatic part of the process. If a PCR needs to be sent to OSP, the Approver must click the *Send to OSP* option. The Send to OSP option is only available at the Agency approval level.

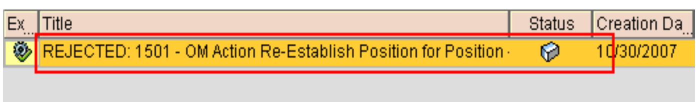


Notes

If an Approver clicks the *Return to initiator* option, a comments window automatically displays (this is not the same as the Services for Objects button). The Approver is required to write a note to the Initiator indicating why the PCR was rejected.

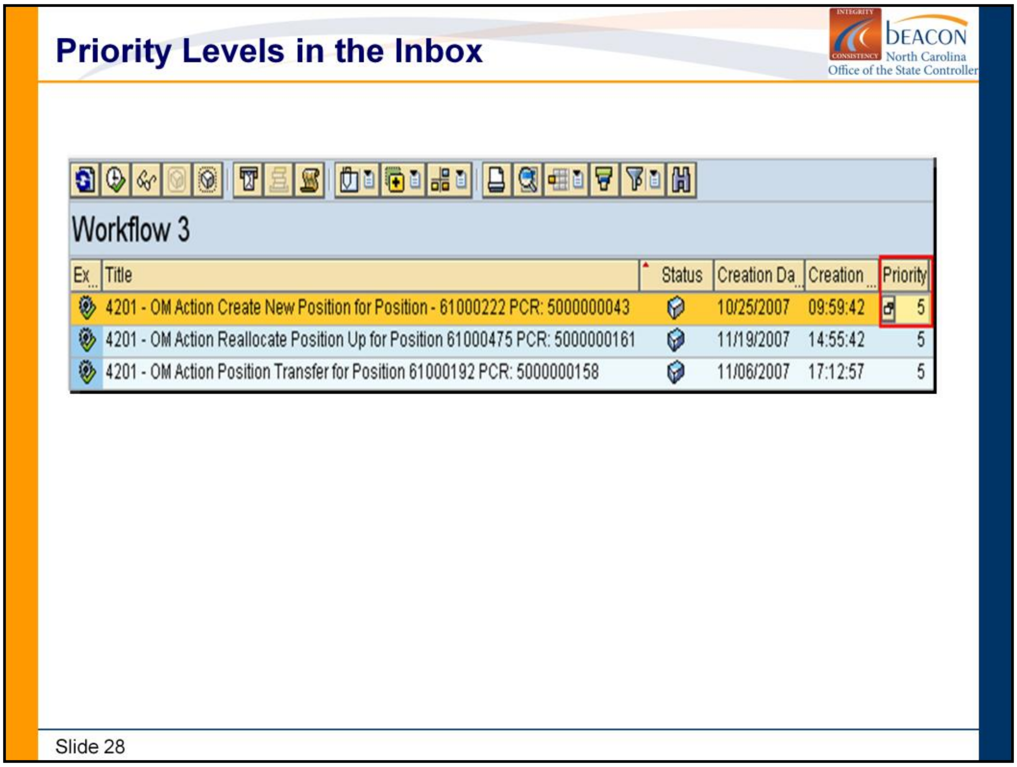
NOTE: The rejected item will not display in the Initiator's Inbox, and the Approver will still see a comments work item in his or her Inbox until the comments are saved.

The returned PCR is no longer in the Approver's Inbox, but is automatically returned to the Initiator. When the Initiator accesses the Inbox, the beginning of the PCR name displays REJECTED in all caps so that it is readily apparent that a PCR has been rejected.



The Initiator has the following options:

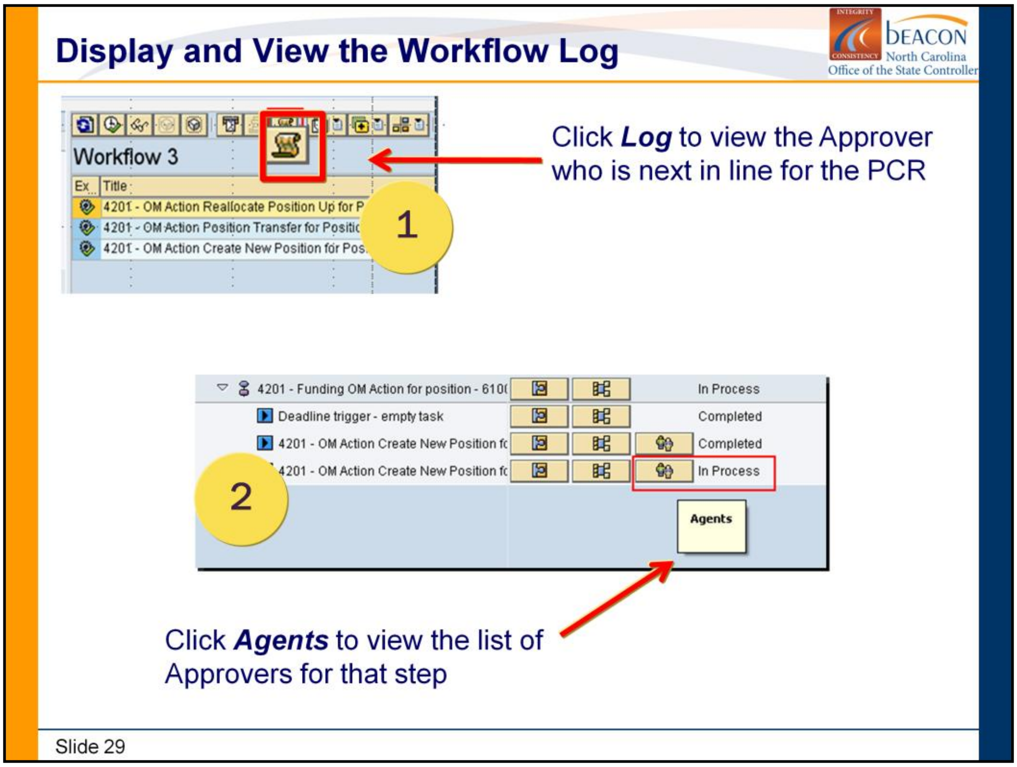
- Cancel OM/PA Action (stop and cancel Workflow for the PCR)
- Change and Resubmit (make a change to the PCR and restart the workflow approval process from the beginning approval level)
- Cancel and keep work item in inbox (leave in the Initiator's inbox for future processing)



Notes

A **Priority** is a setting that indicates the urgency of the Workflow item based on the business requirement. Level 5 is the default priority for all PCRs. Only Division Approvers can change the priority setting, and only when the PCR is in the Division Approver's Inbox.

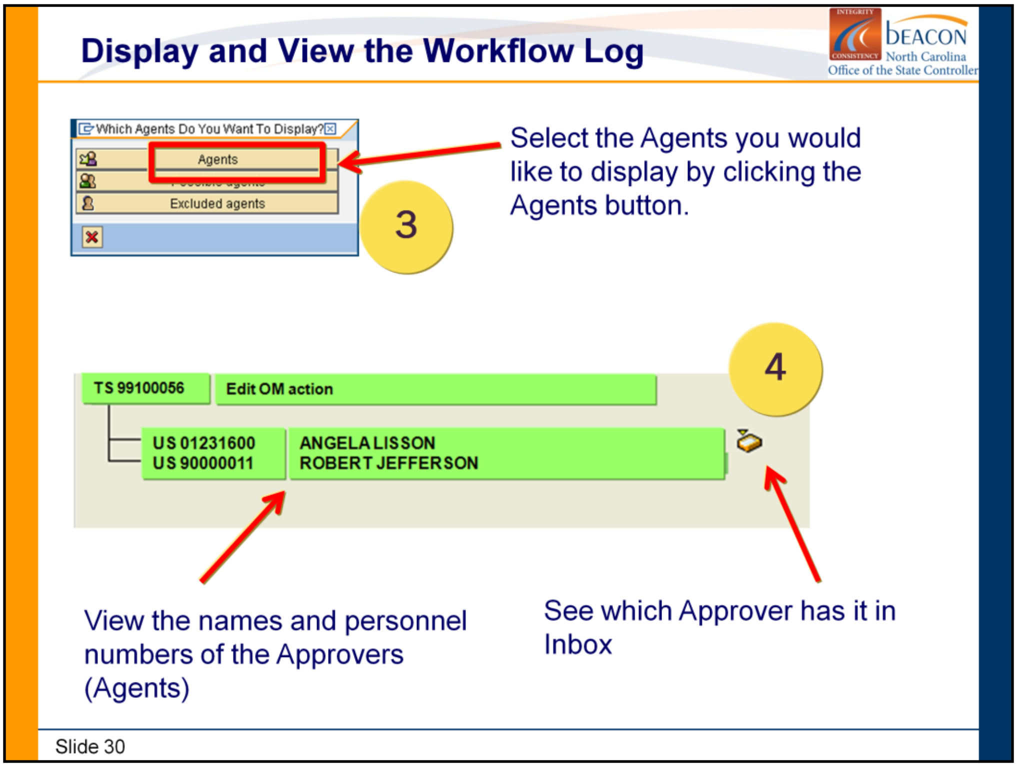
See the *Business Workplace Button Functions Job Aid* on BEACON Help for more information on setting priorities.



Notes

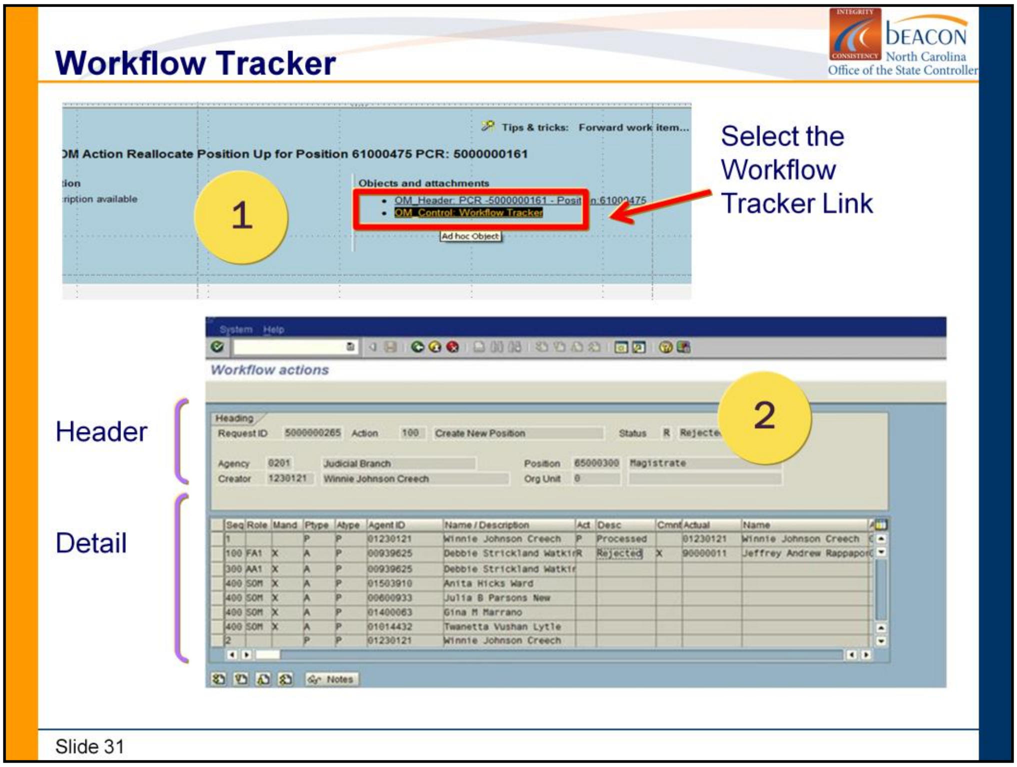
The Workflow Log is a document within Workflow that contains the Step, Status, Result, Time and Agent. The Workflow Log answers the question, “Who has the Workflow item in his/her Inbox?”.

After you select the Log option, the next screen displays the various results for each step. In addition, the Agents option is displayed. Click the Agents icon to view the list of the Approvers for that step.



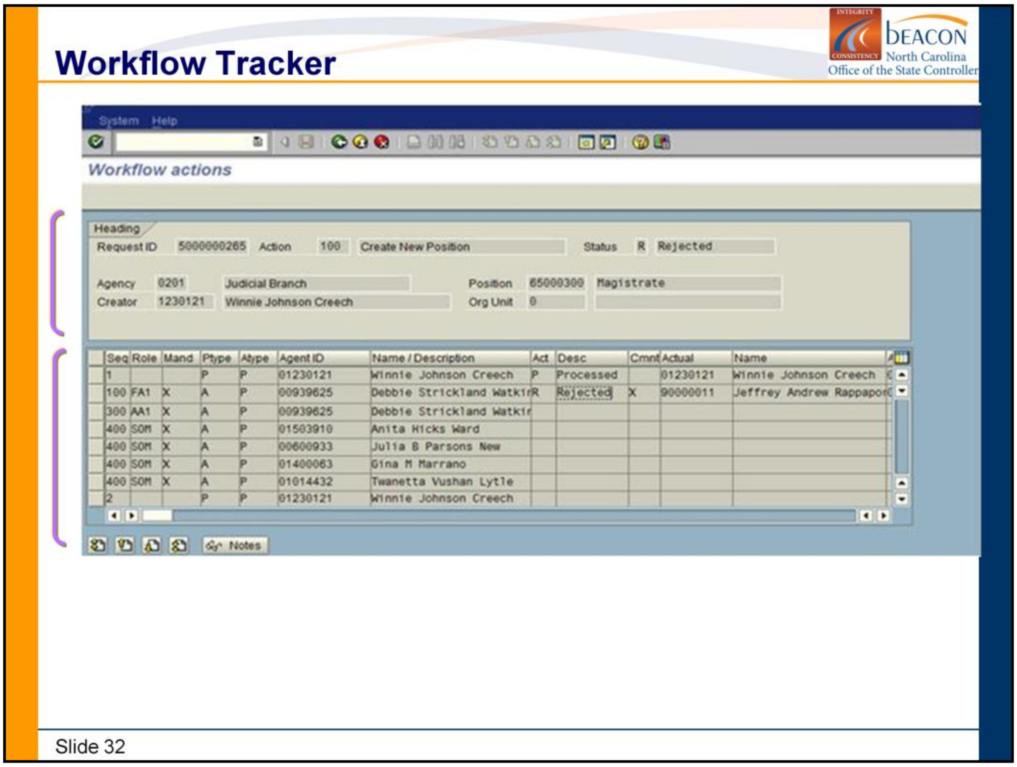
Notes

The Workflow Log illustrated above indicates that this Work Item has two possible Approvers at this level: Angela Lisson or Robert Jefferson.



The Workflow Tracker is a link in the bottom right of the Inbox or Outbox screen (you may have to scroll in order to see it). Using Workflow Tracker, you can see which Approver has processed the PCR, the action the Approver took, and where the PCR is being routed next.

Notes



The Header section will show at a minimum the following fields:

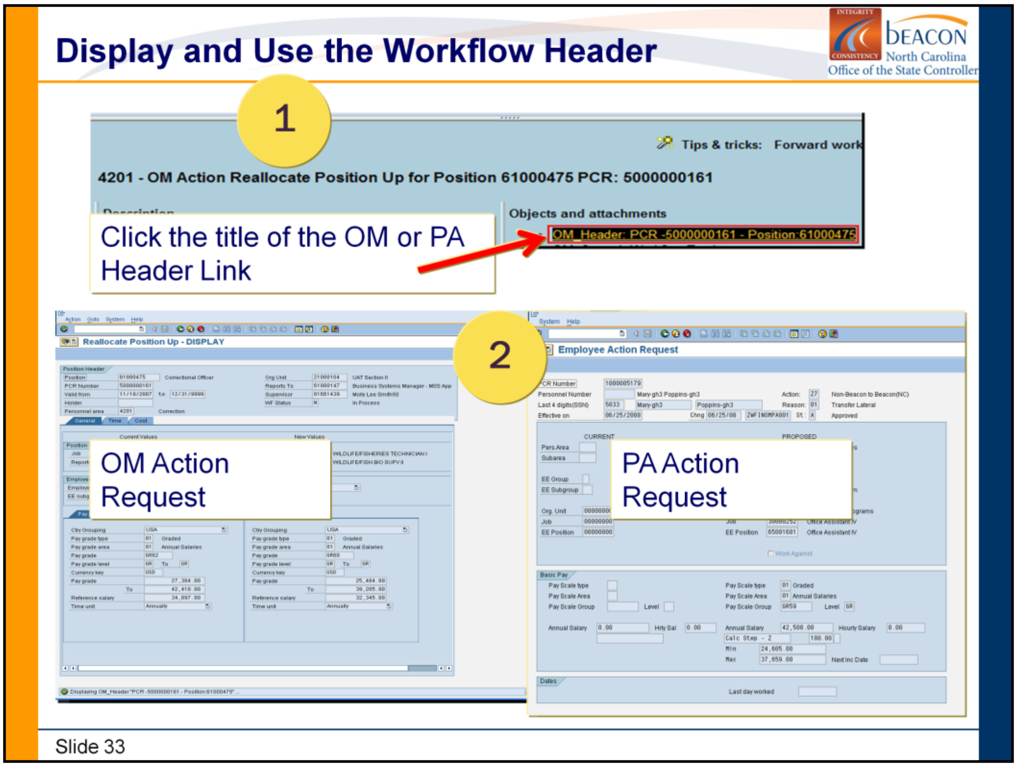
- Request ID (PCR Number)
- Action type (code and name)
- Status (the overall status of the work item)
- Creator (Initiator)

In Addition the header will include specific fields pertinent to either the PA or OM Action (like employee name or position number).

The Detail section will list these attributes:

- Sequence (line item sequence)
- Role represents the approver relationship
  - FA1-Funding Approver
  - DA1 Division Approver
  - AA1- Agency Approver
  - SOM-Shared Services
  - OM Processer
- An X in the Mandatory column indicates that the approval of the specific Approver is required.
- Ptype is used to signify the Processor (P) and Approvers (A)
- Agent ID represents the Personnel number of the Approver
- Name/Description lists the name of the Employee
- Act/Desc holds value (P) Processed
  - A = approved
  - R = rejected
  - P = processed
- An X in the Cmnt column will indicate if a rejection note has been created for the Action. To see the comment, highlight the line and click the Notes icon (eyeglasses).
- Actual/Name is the Initiator’s Personnel number and name

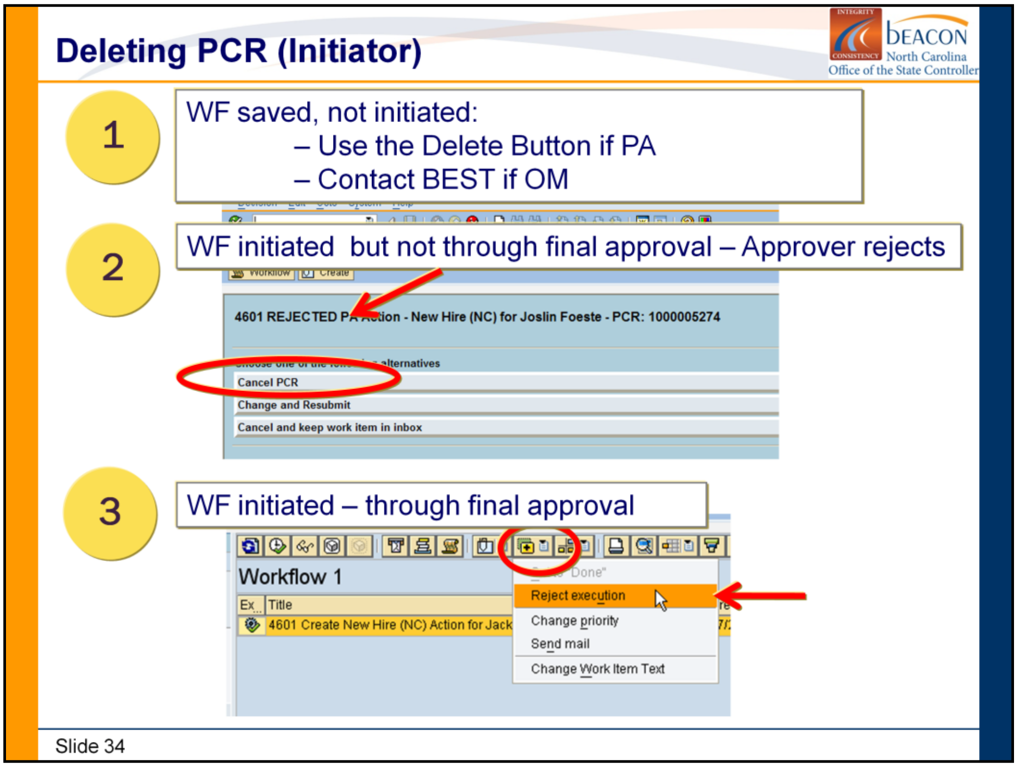
Notes



Notes

When you receive a PCR in your Inbox, you should obviously review the OM or PA Action prior to approving, returning, or cancelling it. Click the link for the Header in order to access the Action screen to see the data that was entered for the PCR.

By using the Header, you can also access the Services for Object button to see any notes or attachments that were sent with the PCR.



Notes

The method you use to delete a PCR depends upon where it is in the process.

1. **If the WF is saved but not initiated:**

   – Use the Delete button on the PCR if PA

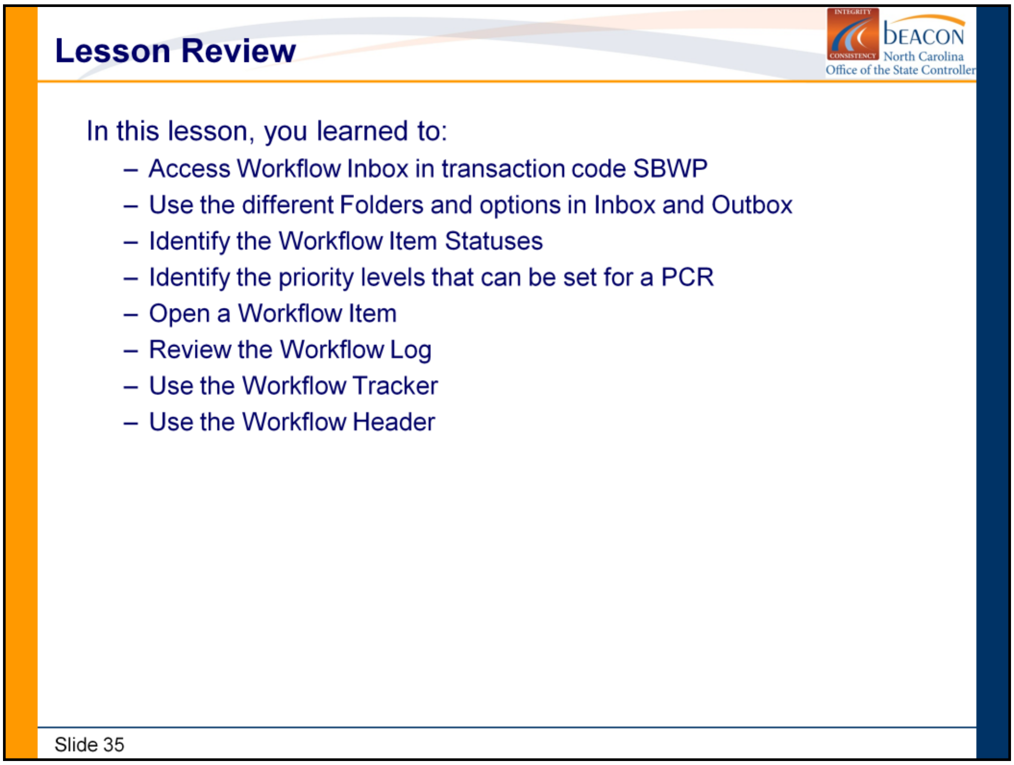
   – Contact BEST if OM

2. **You initiated Workflow but the PCR has not reached final approval:**

   Contact the Approver and request that the PCR be returned (rejected) to you. You can then Execute the PCR. When the Decision Step in Workflow screen displays, click the Cancel PCR option (illustrated above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.

3. **You initiated Workflow and PCR has been approved by final approver but not yet executed:**

   You can only use this option if you have **not executed** the PCR. Highlight PCR and click the “Other Functions” button. From the drop-down menu, select “Reject Execution” (see above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.


Lesson Review
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North Carolina
Office of the State Controller
In this lesson, you learned to:
– Access Workflow Inbox in transaction code SBWP
– Use the different Folders and options in Inbox and Outbox
– Identify the Workflow Item Statuses
– Identify the priority levels that can be set for a PCR
– Open a Workflow Item
– Review the Workflow Log
– Use the Workflow Tracker
– Use the Workflow Header
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Notes

Course Map

BEACON North Carolina Office of the State Controller

- Lesson 1: Workflow Overview
- Lesson 2: Access and Navigate the Workflow Inbox and Outbox
- **Lesson 3: Approve OM Workflow PCRs**
- Lesson 4: Approve PA Workflow PCRs
- Lesson 5: Workflow Report
- Lesson 6: Course Review

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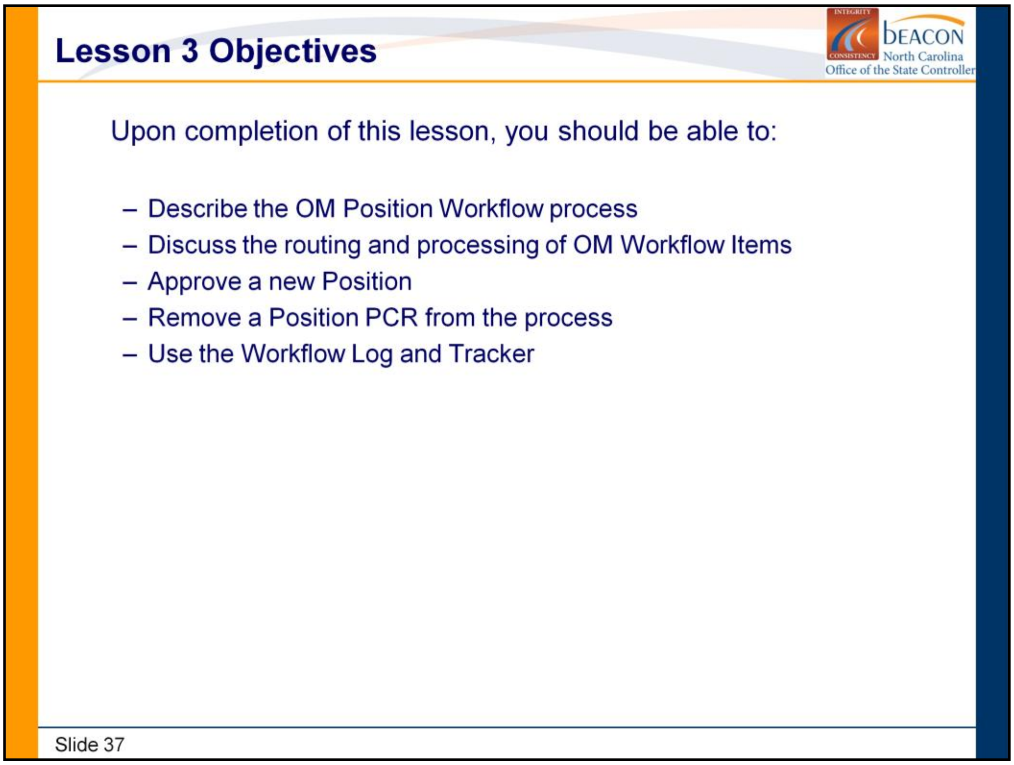
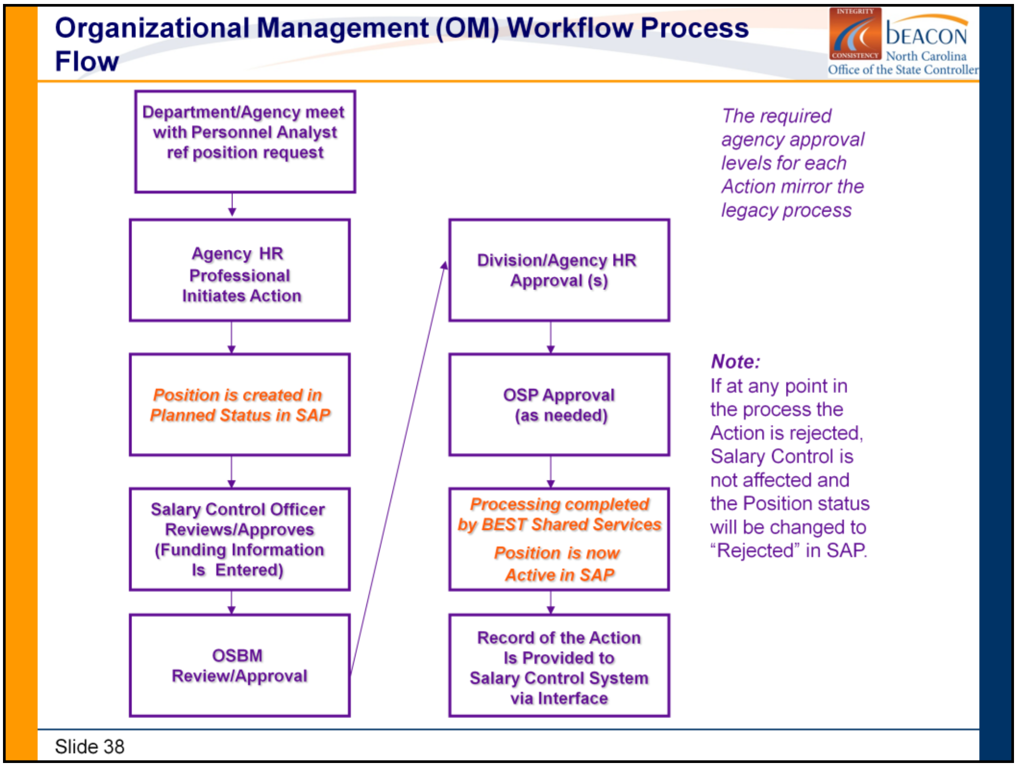
Notes


Lesson 3 Objectives
BEACON North Carolina Office of the State Controller
Upon completion of this lesson, you should be able to:
– Describe the OM Position Workflow process
– Discuss the routing and processing of OM Workflow Items
– Approve a new Position
– Remove a Position PCR from the process
– Use the Workflow Log and Tracker
Slide 37

Notes



All OM Position *Actions* are initiated in Workflow (WF). Approvers at any level can approve to the next level or return to the Initiator. The Initiator can make applicable changes and resubmit to begin the approval process over again.

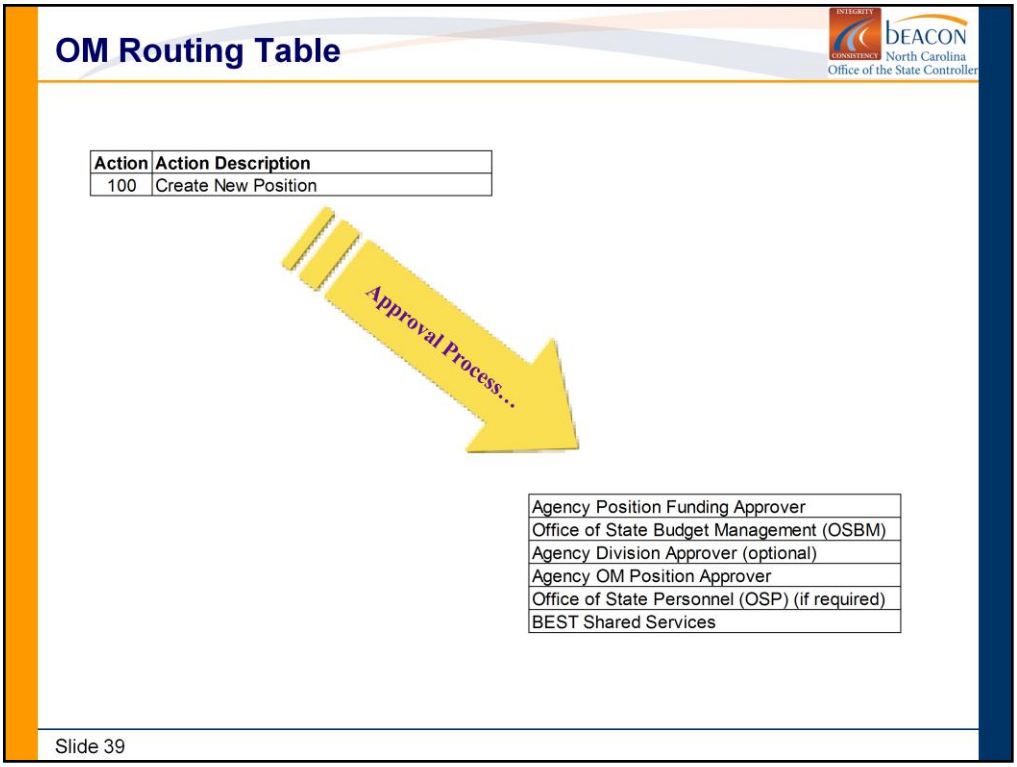
Notes

Roles involved in Position Actions:

- Agency HR Personnel Analyst researches the Action with the appropriate manager.
- Agency HR personnel uses ZOMA069 to enter the required Position data in **planned** status and then initiates Workflow for approvals.
- Agency Salary Control Officer (Agency Position Funding Approver) enters cost distribution and salary and approves the WF or rejects it.
- The OSBM (Office of State Budget and Management) Position Funding Approver approves or rejects the Position Action. OSBM approval is not required for temporary positions.
- Agency Position approver approves or rejects the Position Action.
- Division Position approver approves or rejects the Position Action.
- The OSP Position approver approves or rejects Position Action.
- After final approval, BEST reviews and moves the status to **active**.

It should be noted that some Position changes can be made without Workflow such as:

- Position Working Title
- Position Type
- Cost Distribution changes and Budgeted Salary changes (Funding Approver role only)
- Time Settings
- Vacancy changes
- Position Address



Notes

Only the new Position OM Action requires OSBM Approval.

BEST Shared Services is not an approval level, but rather a process step to complete position Actions.

OM Routing Table (con't)

Action	Action Description
102	Re-Establish Position
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Authorization
107	Reallocate Position Differential
108	Remove Position Differential
109	Abolish Position
113	Position Transfer
115	Position Hours Change
116	Position Employee Group / Subgroup Change

Agency Position Funding Approver
Agency Division Approver (optional)
Agency OM Position Approver
OSP (if required)
BEST Shared Services

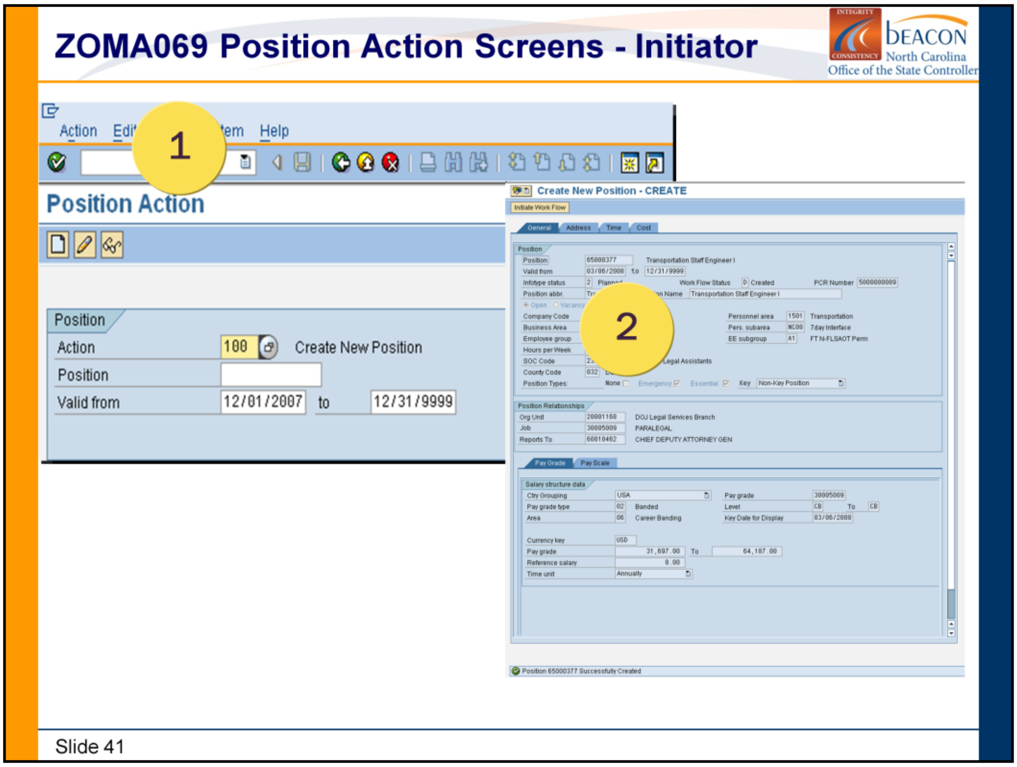
Slide 40

Notes

These Actions shown above do not require OSBM approval.

BEST Shared Services completes these Position Actions in a similar manner as new Position Actions.

NOTE: The abolish action currently requires a ticket entered with BEST Shared Services for processing.



Notes

Following is a brief explanation of how an Initiator creates an OM WF Action.

The Initiator uses transaction code ZOMA069 for position Actions.

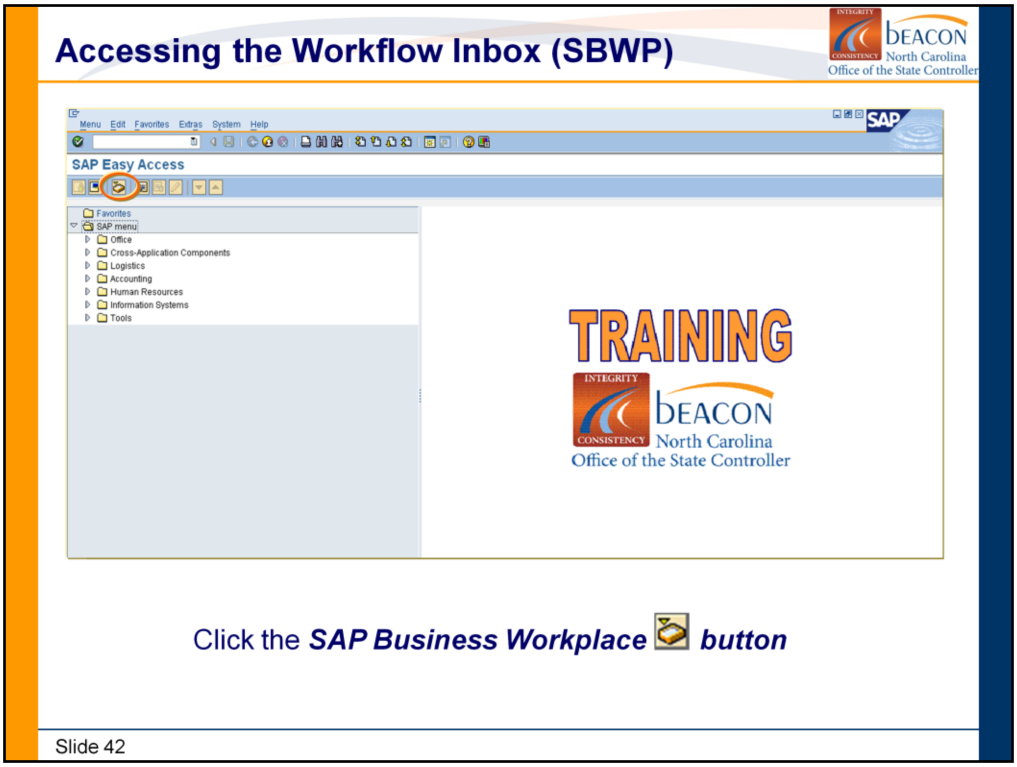
NOTE: Training on ZOMA069 is provided in the *OM210 – OM for Agencies* course.

On the initial screen, the Initiator indicates:

- Action type (new position, reallocate, change county, etc.)
- Effective date
- Position number (only if revising an existing position). Alternatively, the Initiator can also use the Position field to search for a Position that is still in Planned status.

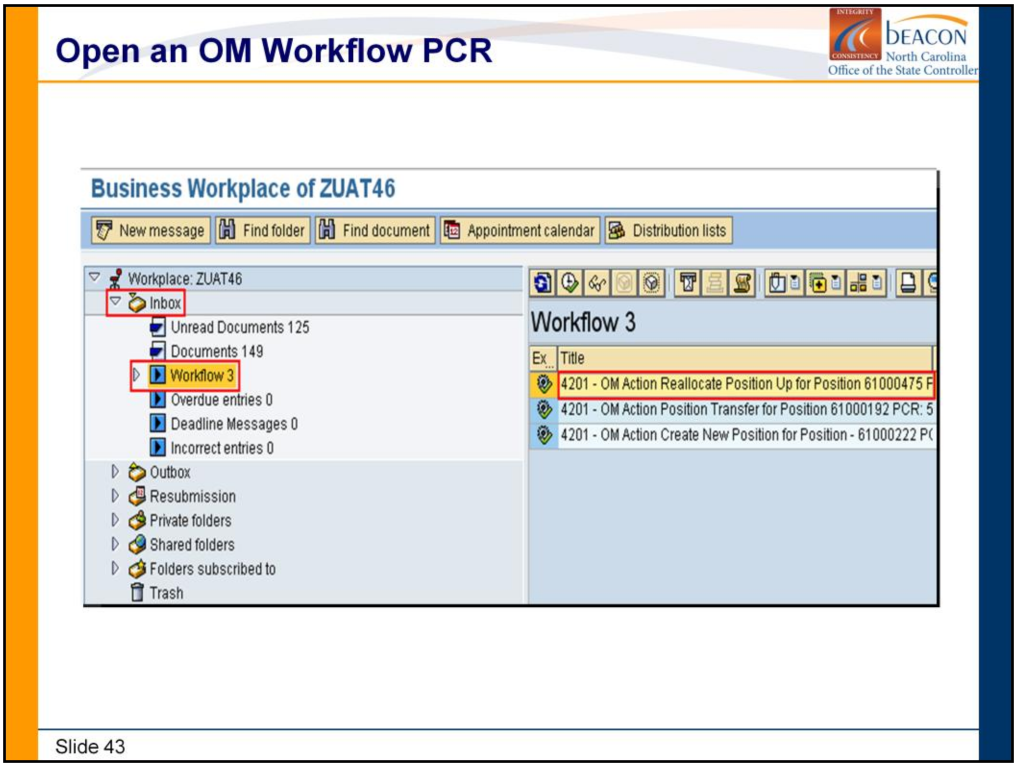
When the Initiator clicks the Create button, a second screen is displayed. The second screen has four tabs (General, Address, Time, Cost). The second screen is either blank or has data depending upon whether creating a new position or updating an existing position. The Initiator enters data as needed on the first three tabs and saves the WF item. When the WF item is saved, BEACON assigns a PCR number. At this stage in the process, the Initiator can include a note or attach documents as needed and then initiate Workflow.

The WF PCR leaves the Inbox of the Initiator and goes to the Inbox of the Approver(s) at the first approval level (Agency Funding). The Funding Approver will review the General tab and enter applicable funding data (Cost distribution and budgeted salary) on the Cost tab.



Notes

As the OM Approver, you will log into your Inbox (SAP Business Workplace, or transaction code SBWP) to view all of the Workflow PCRs that have been sent to you to process.



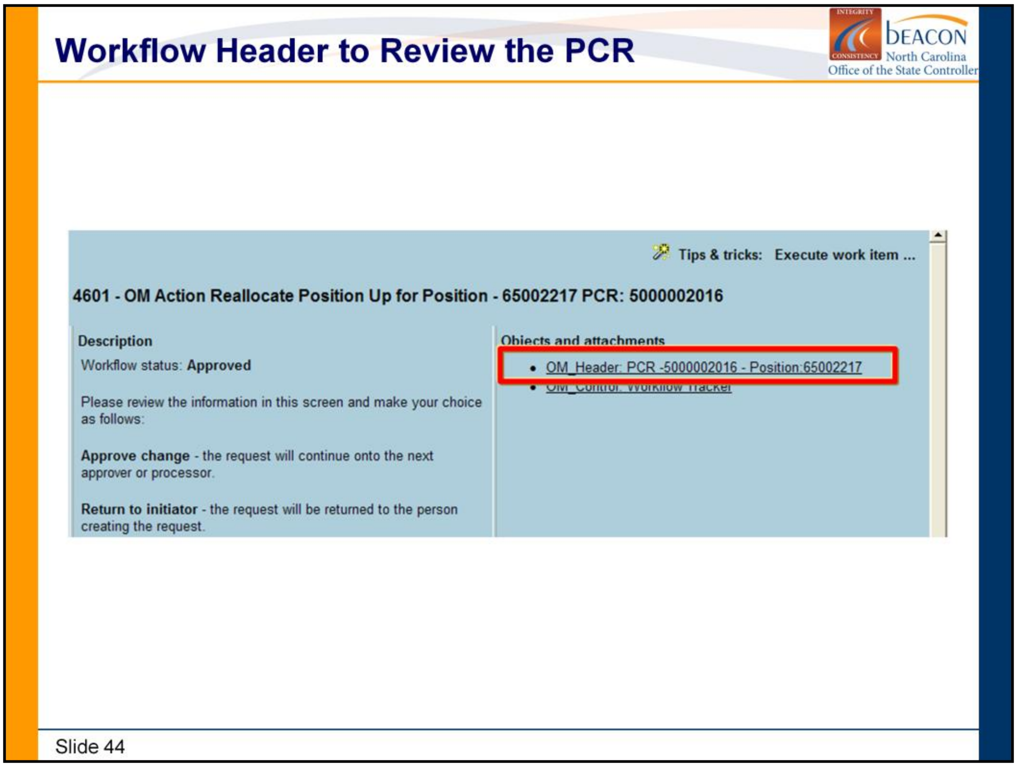
Notes

Follow these steps to enter the SAP Workflow Inbox:

1) Click the Inbox to expand it.
2) Double-click Workflow. All of the WF PCRs sent to the Approver for processing display in the right column. In the illustration above, the Approver has three PCRs in the Inbox.
3) The Approver can either select and double-click on the WF PCR to execute it or click the Execute button on the toolbar.

Refer to the BEACON Help website for assistance with icon and button recognition. The following Workflow Job Aids can be of help:

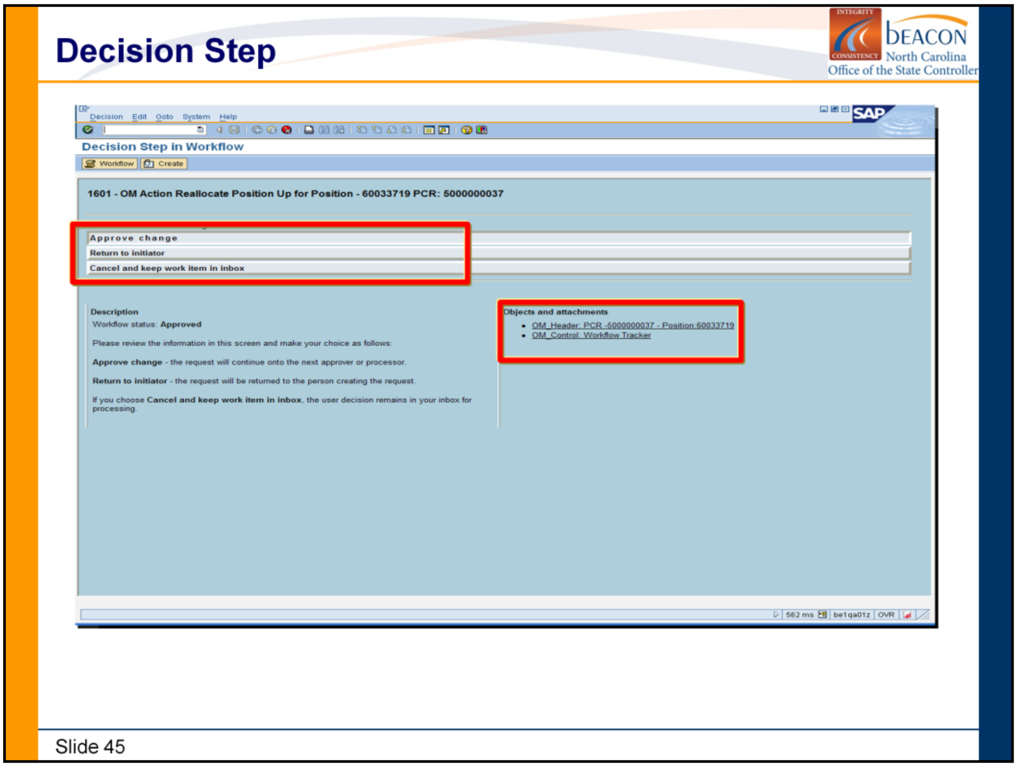
- *Business Workplace Button Functions*
- *Business Workplace Overview Tree Functions*



Notes

To review the PCR, the Approver must click the OM_Header PCR - <pcr number> Position <position number> link located in the lower left. The PCR opens and allows the Approver to view the data that the Initiator entered on the various tabs.

Alternatively, the Approver can also use the Workflow Tracker (located in the same area) to see the actions already taken, by whom it was taken, and where the PCR will be sent next.



Notes

After the PCR is executed, the *Decision Step in Workflow* screen is displayed. The Approver can also view the Header and Tracker from this screen. The Approver can either Approve, Return to Initiator (reject), or Cancel and keep the work item in the Inbox.

NOTE: “Cancel and keep the work item in inbox” places the PCR only in the Inbox of the Approver who cancelled it. This decision removes the PCR from the Inbox of any other Approvers who were at the same Approval level. Using the Cancel function allows an Approver to research information and either approve or return the PCR at a later date.

This cancel function does not cancel the PCR.

3.1 – Exercise: Approve a Position PCR

BEACON North Carolina Office of the State Controller

- A Position PCR has been sent to your Inbox. Review the PCR and accompanying note. Change the priority from medium to very high, and then approve it. In this exercise, you are the OM Division/Agency Approver.
- After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.

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Notes

3.2 – Exercise: Reserve a Position Change PCR

You have received a PCR to change the county of a position. When you review the PCR and the accompanying attachment you believe the wrong county has been selected. Use the Reserve function to remove it from Workflow until you complete your research. In this exercise, you are the OM Division/Agency Approver.

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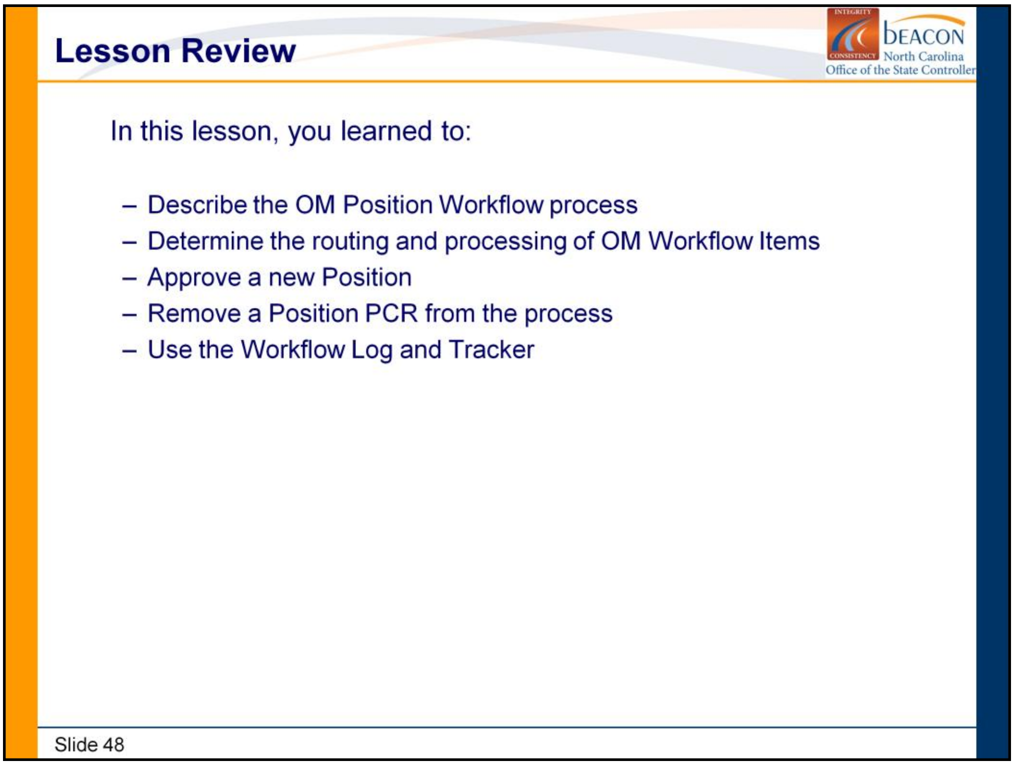
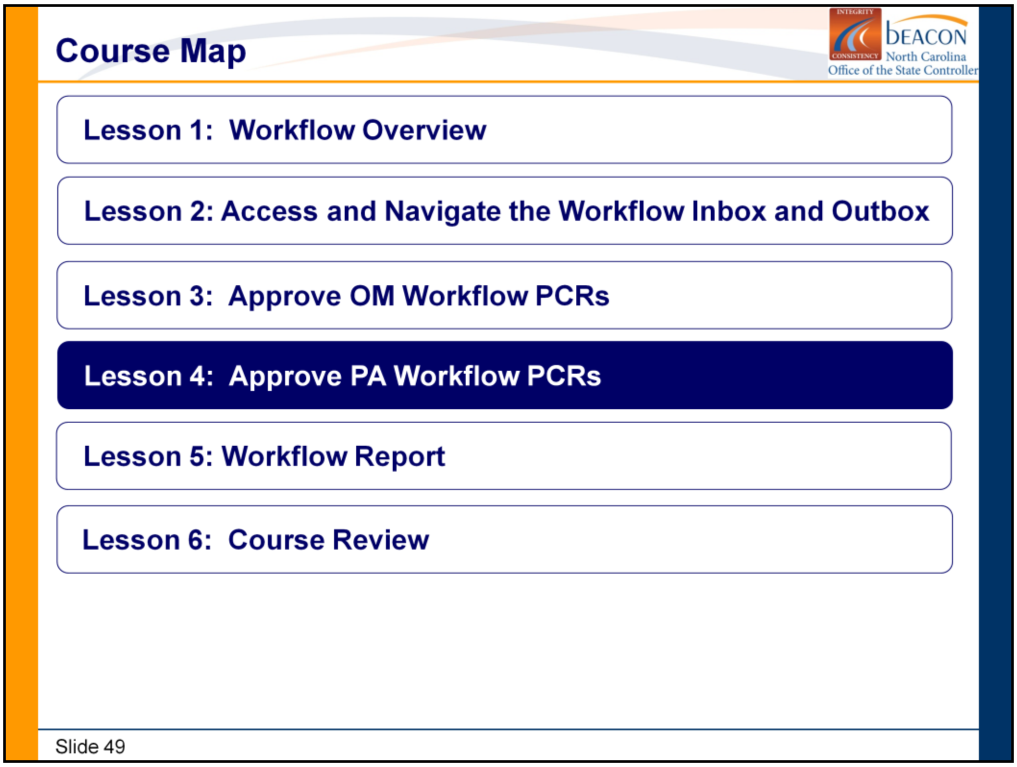
Notes


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson, you learned to:
– Describe the OM Position Workflow process
– Determine the routing and processing of OM Workflow Items
– Approve a new Position
– Remove a Position PCR from the process
– Use the Workflow Log and Tracker
Slide 48

Notes


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: Workflow Overview
Lesson 2: Access and Navigate the Workflow Inbox and Outbox
Lesson 3: Approve OM Workflow PCRs
Lesson 4: Approve PA Workflow PCRs
Lesson 5: Workflow Report
Lesson 6: Course Review
Slide 49

Notes

Lesson 4 Objectives

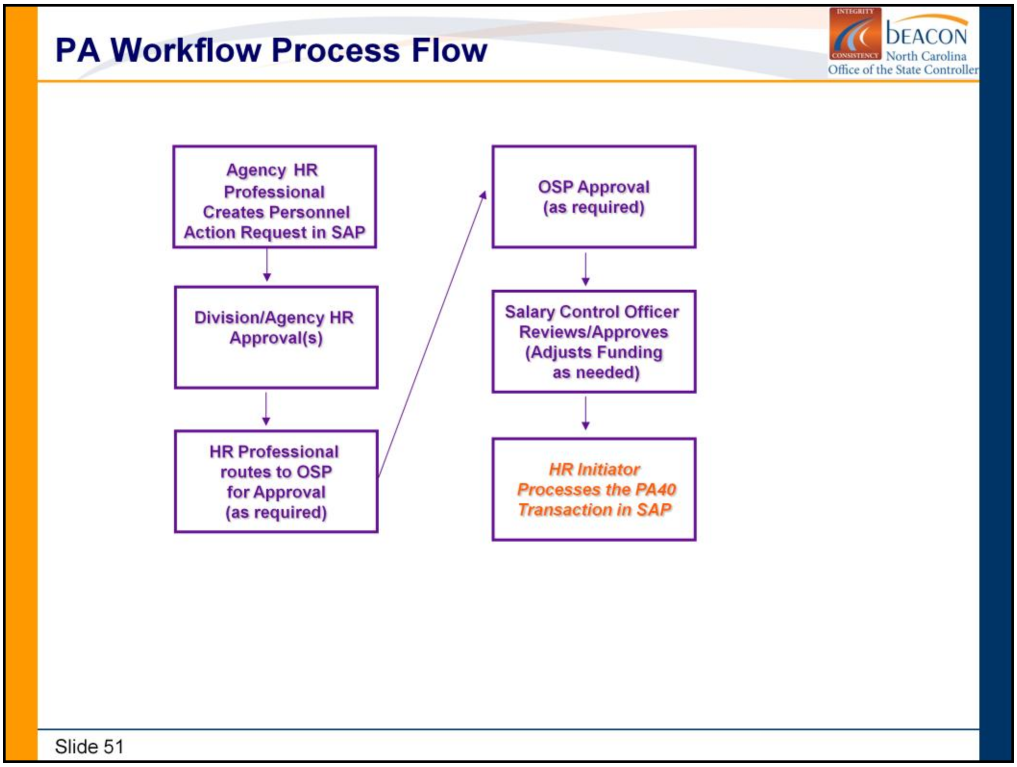
BEACON North Carolina Office of the State Controller

After completing this lesson, you should be able to

- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Approve PA Actions

Slide 50

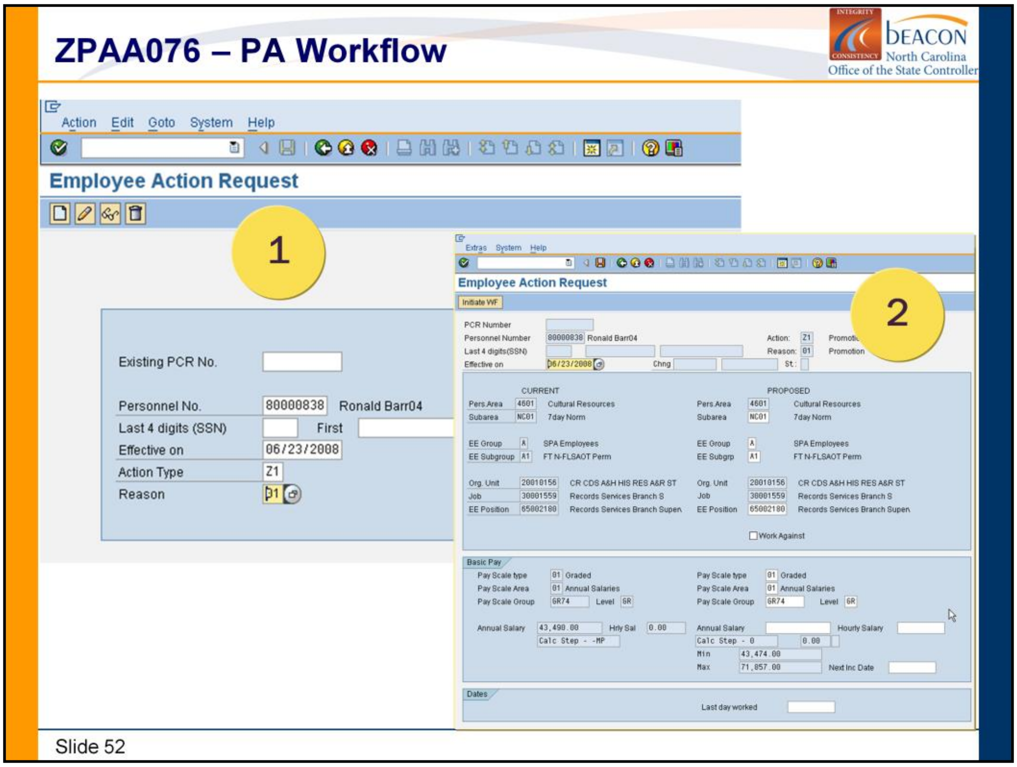
Notes



Notes

The PA action is not complete until the PCR has been approved and processed by the Initiator. The WF PCR is simply a form to collect some of the basic information for approval purposes before the Personnel Action is processed (and the employee's personnel file is updated). When the approval process is complete, the Initiator receives the PCR back in his or her Inbox. The Initiator executes the PCR from the Inbox and BEACON automatically takes the initiator to the appropriate screen (Hiring for New Hires and Non-Beacon to Beacon; Personnel Actions for all others). The Initiator enters data or saves all applicable infotypes (BEACON SAP has bundled all of the appropriate infotypes that require attention for the Action). After all infotypes have been completed, the Initiator receives the "Complete Workflow Item button. It is important that **only** when the PA Action has been completely processed should the initiator mark the PCR workflow item as complete (the exception to this is when a Transfer Agency to Agency is involved and the Initiator does not have security access for both Agencies—see *PA410 - Advanced Create and Maintain Data* for details).

If the PCR is marked complete prior to the Action being completely processed in BEACON SAP, the Initiator must use transaction code PA40 to re-process the Action and enter data and/or save as applicable every infotype appropriate for that Action.



Notes

Following is a brief explanation of how an Initiator creates a PA WF Action.

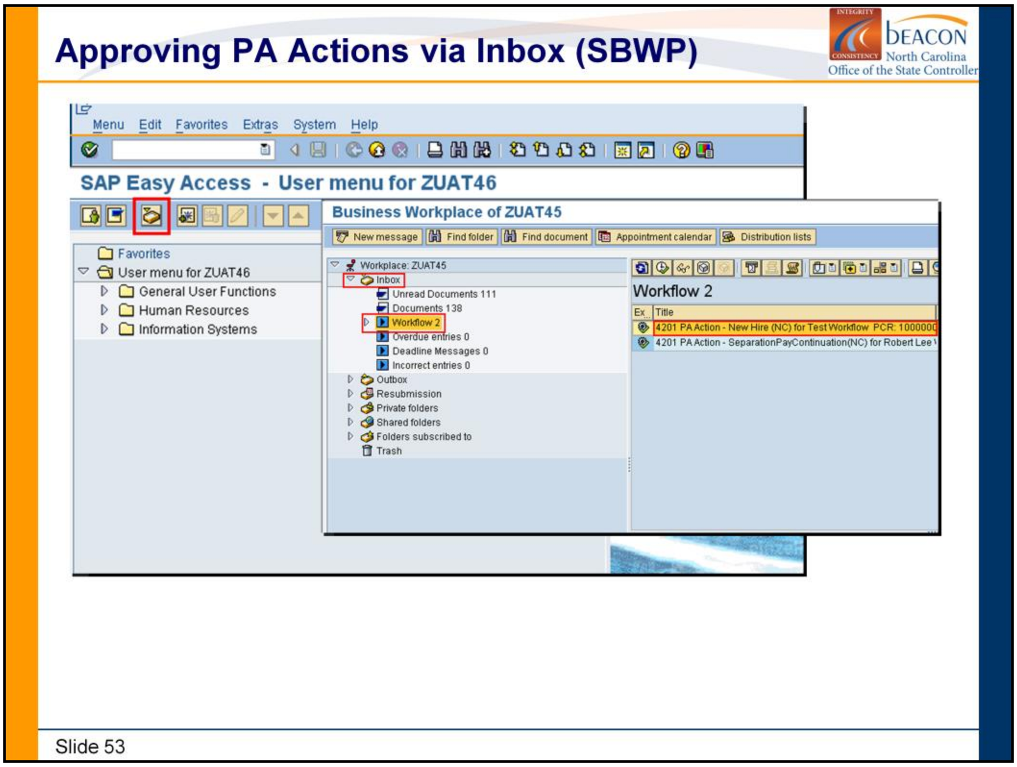
Using transaction code ZPAA076 for Personnel Actions the Initiator enters data on the initial screen.

NOTE: Training on ZPAA076 is provided in both the *PA310 – Create and Maintain Employee Data* and *PA410 – Advanced Create and Maintain Employee Data* courses.

On the initial screen, the Initiator enters*:*

- PCR (only if updating an existing PCR)
- Action type
- Last 4 digits of Social Security number (only if new hire)
- Effective date
- Action type
- Reason

When the Initiator clicks the Create button, a second screen is displayed. The second screen has two columns, Current and Proposed. If the Action is a new hire, the Current column is blank; otherwise it is populated with the existing data for the employee. The Initiator enters data in the applicable fields in the Proposed column and saves the Workflow item. The Initiator receives the PCR number and initiates WF. The WF PCR leaves the Inbox of the Initiator and goes to the Inbox of the approver(s) at the first approval level.



Notes

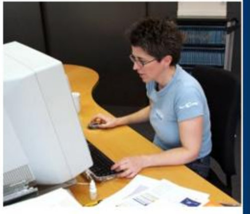
Approving PA Actions is, in many ways, similar to the process you used to approve Position Actions in earlier exercises. You will access your Inbox to locate PA PCRs that have been sent for you to approve, cancel, or return.

You can view notes and attachments as well as use the Workflow Tracker and Log.

4.1 – Exercise: Change Priority & Approve Promotion PCR

BEACON North Carolina Office of the State Controller

- Review the PCR and accompanying note to promote Allison Sellers
- Change the priority from medium to very high
- Approve the PCR
- Use Outbox to view Workflow Tracker



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Notes

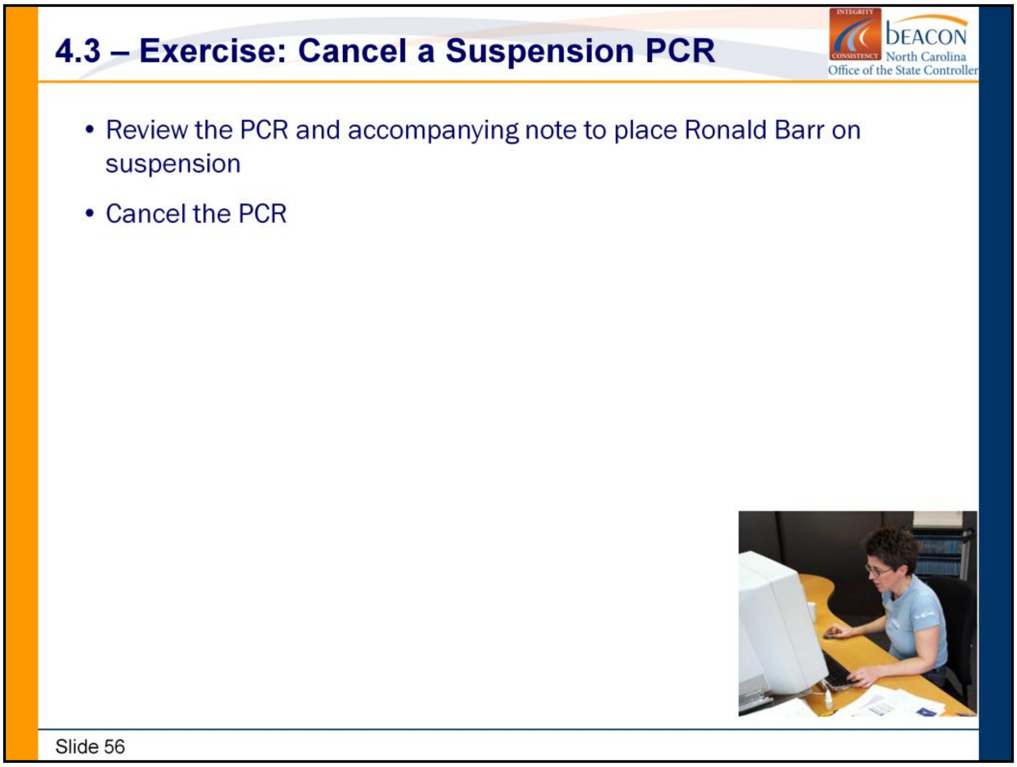
4.2 – Exercise: Reject a Salary Adjustment PCR

BEACON North Carolina Office of the State Controller

- Review the PCR and accompanying note to give Nancy Gonzalez a salary adjustment
- Reject the PCR and write a note to Initiator
- Use Outbox to view Workflow Tracker

Slide 55

Notes

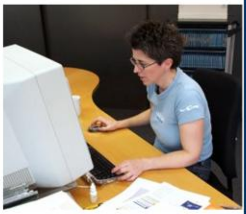

4.3 – Exercise: Cancel a Suspension PCR
BEACON
North Carolina
Office of the State Controller
• Review the PCR and accompanying note to place Ronald Barr on suspension
• Cancel the PCR
Slide 56

Notes

4.4 – Exercise: Replace a PCR

BEACON North Carolina Office of the State Controller

- Place the Position Change PCR Back into Workflow and approve it
- Place the Suspension PCR back into Workflow and send to OSP



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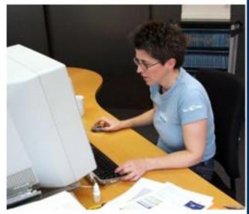
Notes

Optional Funding Exercises

- Funding Approvers should attend the *WF250 - OM/PA Funding Approvers* course
- An optional exercise is presented in the Exercise Guide if needed:
  - Split funding for a position



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Notes

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Lesson Review

BEACON North Carolina Office of the State Controller

In this lesson, you learned to:

- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Approve PA Actions

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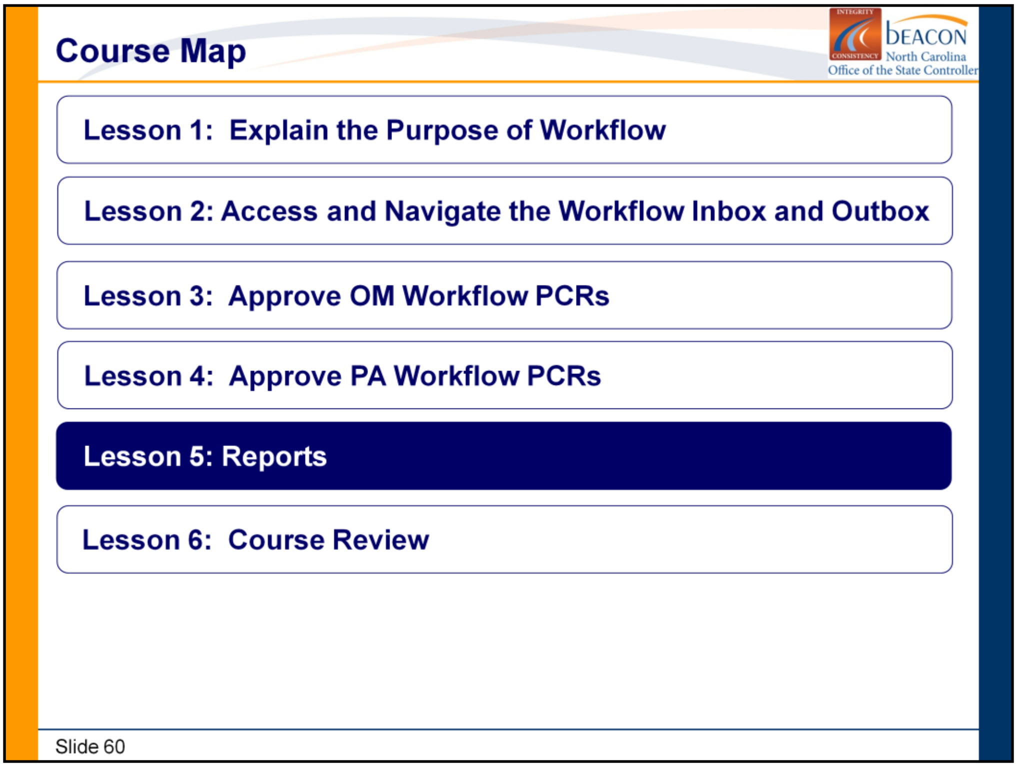
Notes


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: Explain the Purpose of Workflow
Lesson 2: Access and Navigate the Workflow Inbox and Outbox
Lesson 3: Approve OM Workflow PCRs
Lesson 4: Approve PA Workflow PCRs
Lesson 5: Reports
Lesson 6: Course Review
Slide 60

Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Execute the Workflow Report
    - Access and execute the Workflow Report for PA and OM
    - Change the layout of the report
    - Create a variant for the report
    - Retrieve a report variant
- Execute the Organizational Structure Report

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Notes

Workflow Report Overview

- The Workflow Report allows Approver and Managers to see at a glance the:
  - type of Actions and reasons created in the Agency
  - Actions that are awaiting approval and at which approval level
  - length of time an approval has been waiting
- Transaction codes:
  - ZPA0189 (PA reports)
  - ZOM0178 (OM reports)
- Reports can be run based on security by:
  - Agency
  - Groups
  - Individual PCR
- Access the ***Workflow Report Job Aid*** online at:
  - http://help.mybeacon.nc.gov/beaconhelp/TOC7.html

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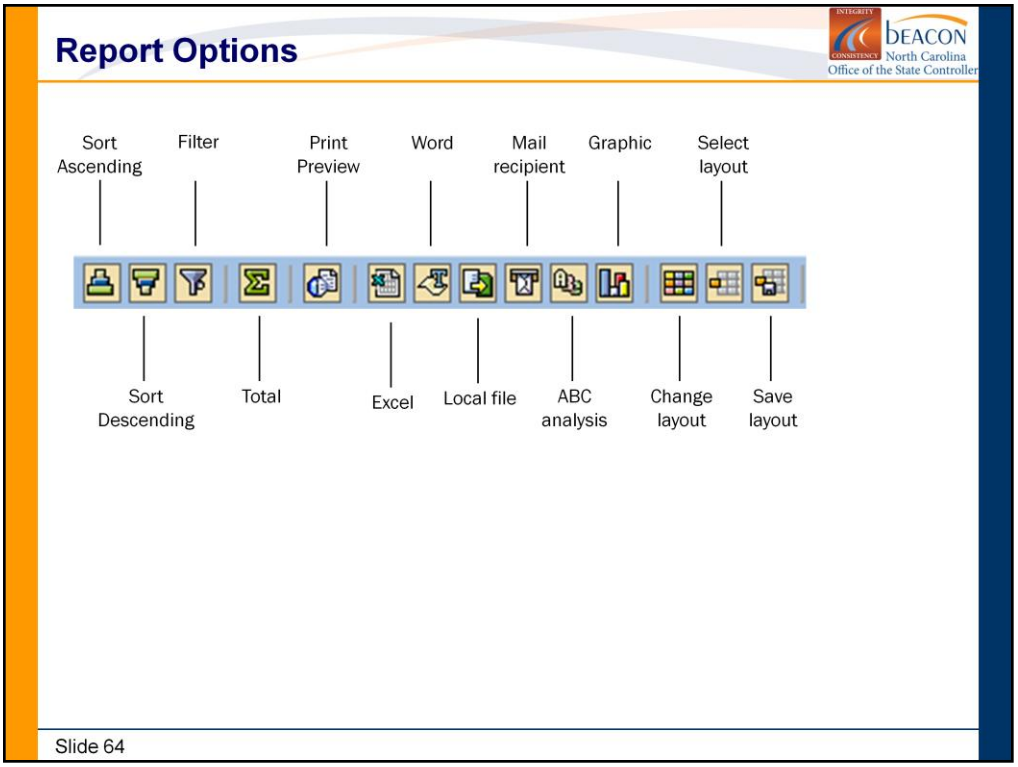
Notes

Searching for PCRs

- PA
  - Personnel number
  - Action type
  - Personnel area
  - PCR ID
  - PCR WF Approval Level
- OM
  - Position ID
  - Action
  - Personnel area
  - PCR IDPCR WF Approval level

Slide 63

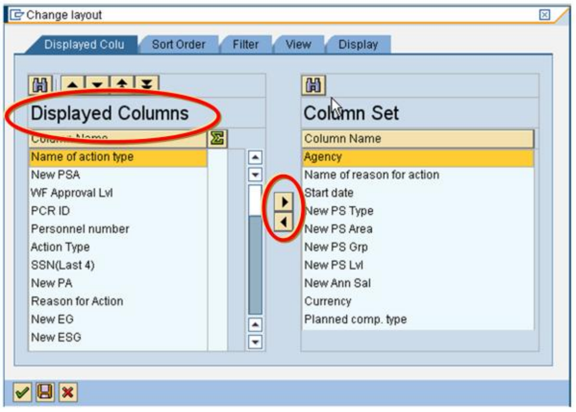
Notes


Report Options
BEACON
North Carolina
Office of the State Controller
Sort Ascending
Filter
Print Preview
Word
Mail recipient
Graphic
Select layout
Sort Descending
Total
Excel
Local file
ABC analysis
Change layout
Save layout
Slide 64

Notes

Modify Layout

Use the Change Layout option to remove fields that you do not want to display from left to right



Drag and drop columns on the report to change the order

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Notes

Save Layout

BEACON North Carolina Office of the State Controller

- Save layout field
  - Short name (begin with Z for user-specific)
- Name
  - Longer description for the layout
- User-specific
  - Only you have access
- Default setting
  - Indicates you want the layout to display each time the report is run

Slide 66

Notes

Use a Layout

BEACON North Carolina Office of the State Controller

- Complete search criteria fields for the report
- Click the Select layout option

  or
- From the menu: Settings > Layout > Choose
- Select the applicable layout option
- Execute the report

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Notes

5.1 – Exercise: Execute the Workflow Report (PA)

BEACON
North Carolina
Office of the State Controller

You need to see if there are any Suspension and Reallocation PA Actions for Org Unit 4601 (Cultural Resources) awaiting approval. In addition, you want to change and save the layout to your specifications.

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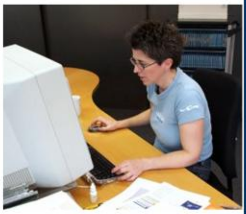
Notes

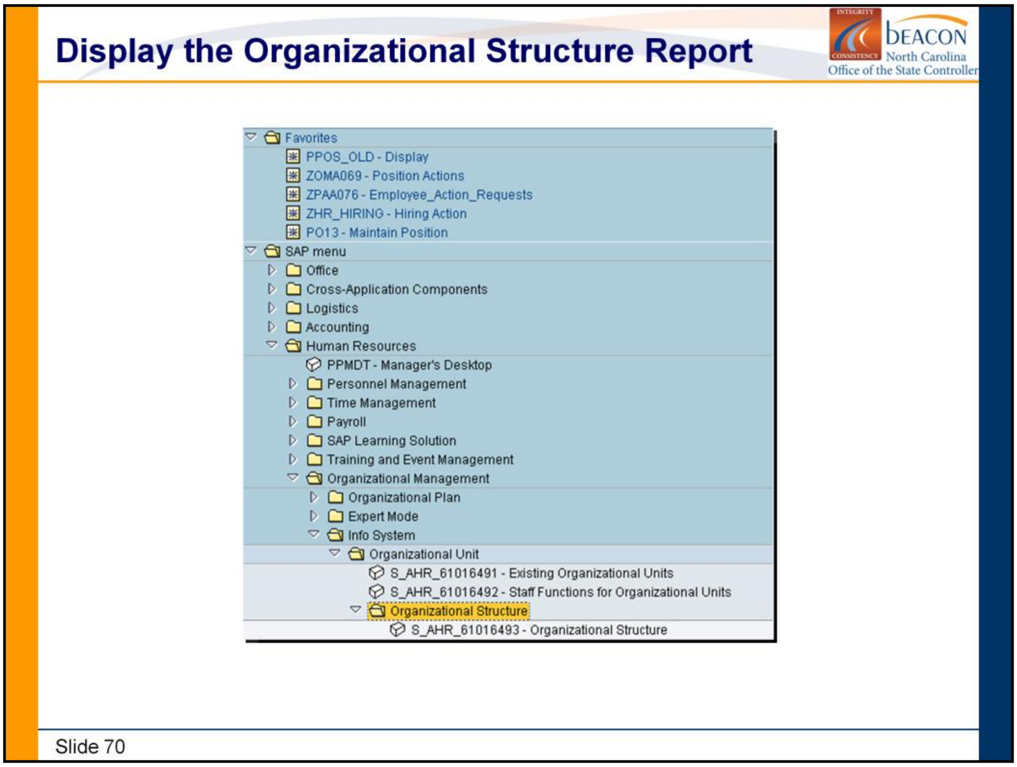
5.2 – Exercise: Use a Saved Layout to Run WF

You need to see if there are any Promotion PA Actions for Org Unit 4601 (Cultural Resources) awaiting approval. You want to use the same layout that you previously saved.



Slide 69

Notes



Notes

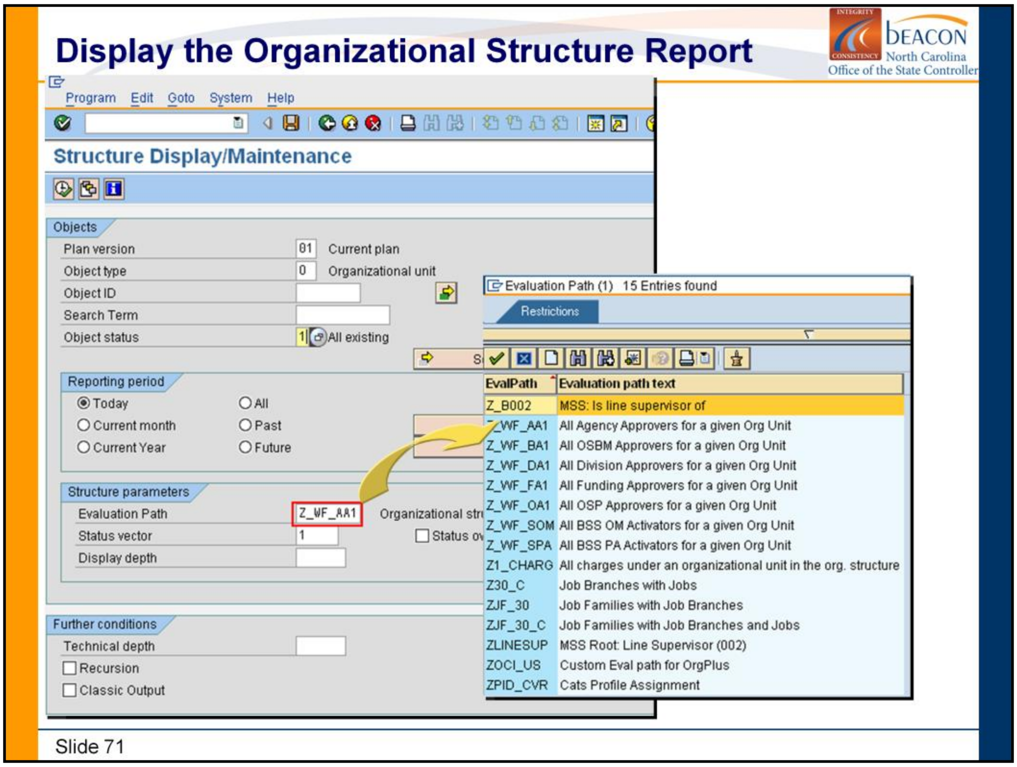
Use transaction code **S_AHR_61016528** - Organizational Structure to generate an Organizational Plan view of the approvers supporting the workflow process.

OM approvers are identified by having a relationship created between their position and the Organizational unit. The Organizational unit represents a segment of the structure that approvers are responsible for managing within the workflow process.

Positions will not necessarily be approvers within their own organizational unit. Approvers may be responsible for a larger grouping of organizational units. As a result, a relationship between their position and the highest organizational unit within that area will be created and inherit responsibility for all organizational units within the hierarchy.

Users of this report could be:

- Position Action and Employee Action Initiators
- Approvers (Agency Approvers, Division Approvers, OSP, OSBM)
- BEST Shared Services
- BEACON Production Support Team

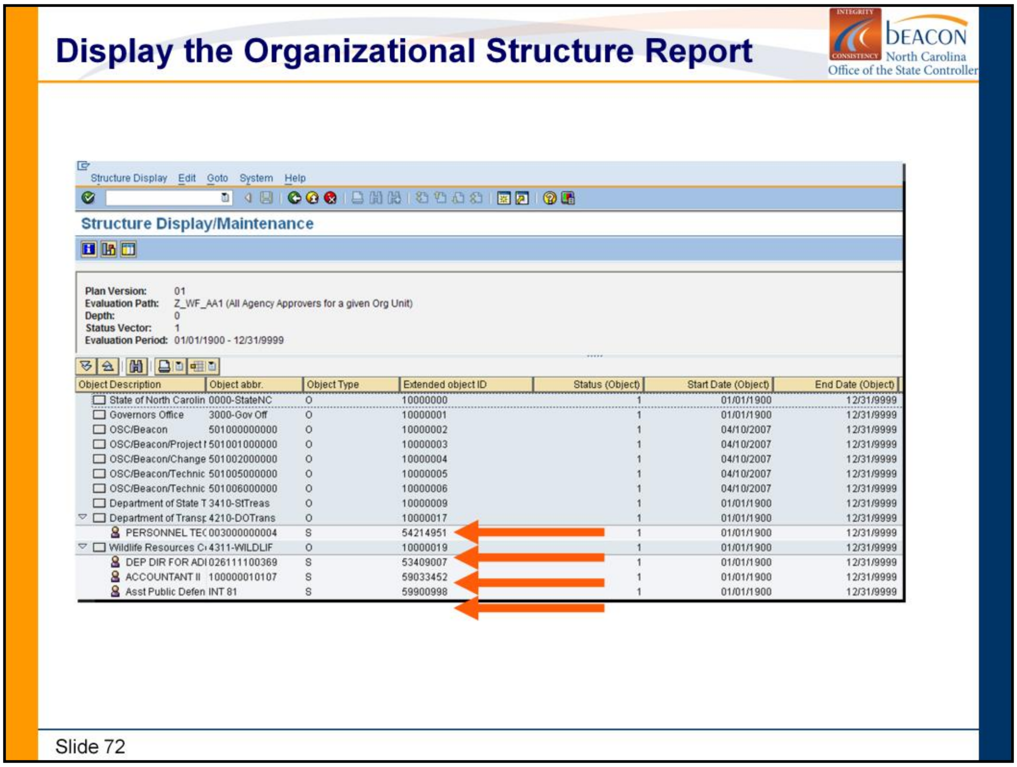


Notes

At the Structure Display/Maintenance screen, enter specific selection criteria.

To display the Evaluation Path, use the matchcode and enter Z* to search for the available paths:

- Z_WF_AA1 Agency Approvers for an Organizational unit structure
- Z_WF_BA1 OSBM Approvers for an Organizational unit structure
- Z_WF_DA1 Division Approvers for an Organizational unit structure
- Z_WF_FA1 Funding Approvers for an Organizational unit structure
- Z_WF_OA1 OSP Approvers for a Organizational unit structure
- Z_WF_SOM BEST Shared Services processes for an Organizational unit structure responsible for OM Position Actions
- Z_WF_SPA BEST Shared Services processes for an Organizational unit structure responsible for PA Employee Actions



Notes

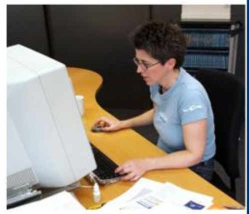
SAP will display the list of all of the selected Organizational units and their Approver Positions.

5.3 – Exercise: Execute the Org Structure Report

BEACON North Carolina Office of the State Controller

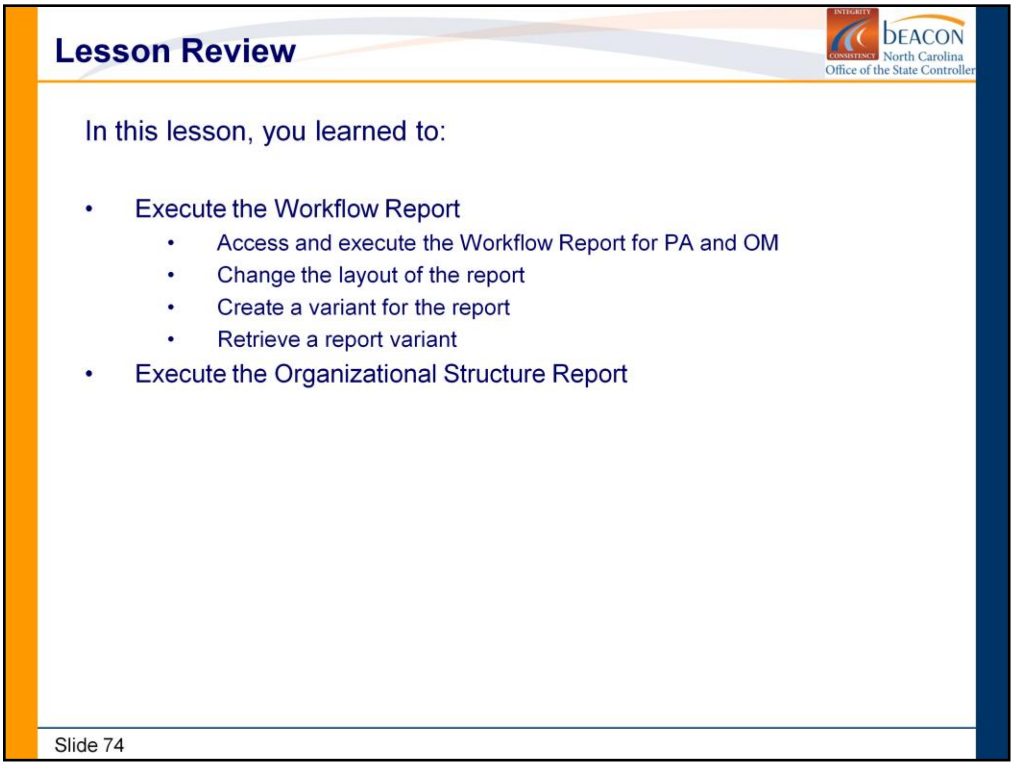
You need to see a list of the approvers for OM Action for the following Org Units:

- 20010134 – CR CDS Archives and History
- 20012267 – OSBM Admin Deputy



Slide 73

Notes


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson, you learned to:
• Execute the Workflow Report
• Access and execute the Workflow Report for PA and OM
• Change the layout of the report
• Create a variant for the report
• Retrieve a report variant
• Execute the Organizational Structure Report
Slide 74

Notes

Course Map

- Lesson 1: Explain the Purpose of Workflow
- Lesson 2: Access and Navigate the Workflow Inbox and Outbox
- Lesson 3: Approve OM Workflow PCRs
- Lesson 4: Approve PA Workflow PCRs
- Lesson 5: Workflow Report
- **Lesson 6: Course Review**

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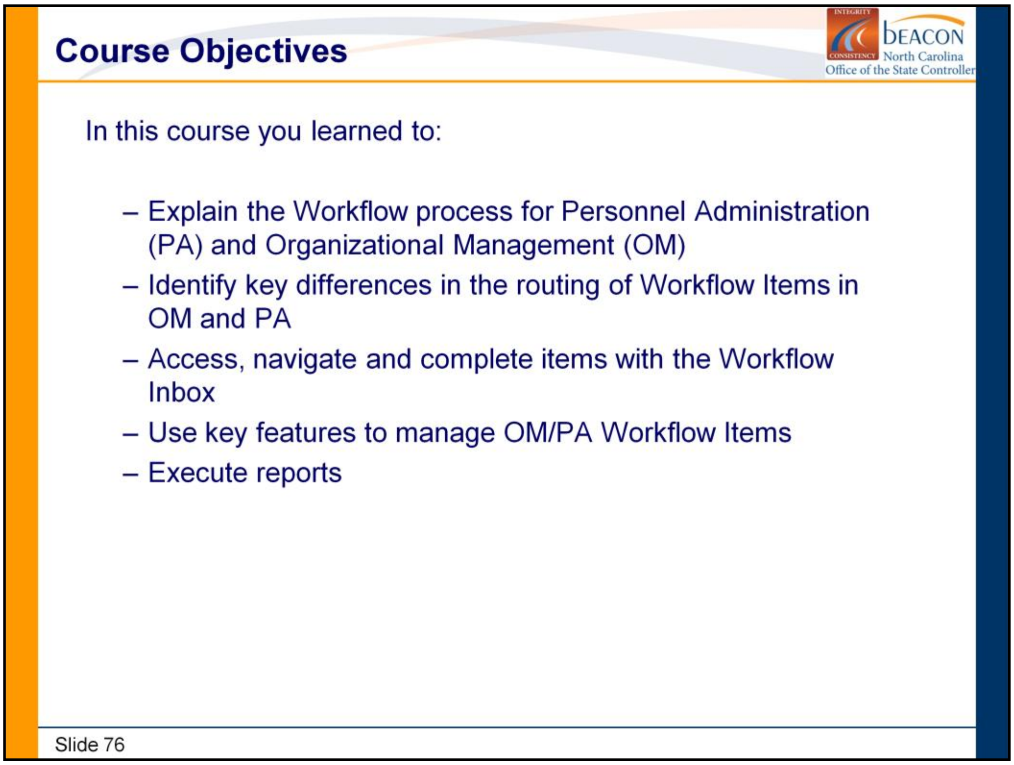
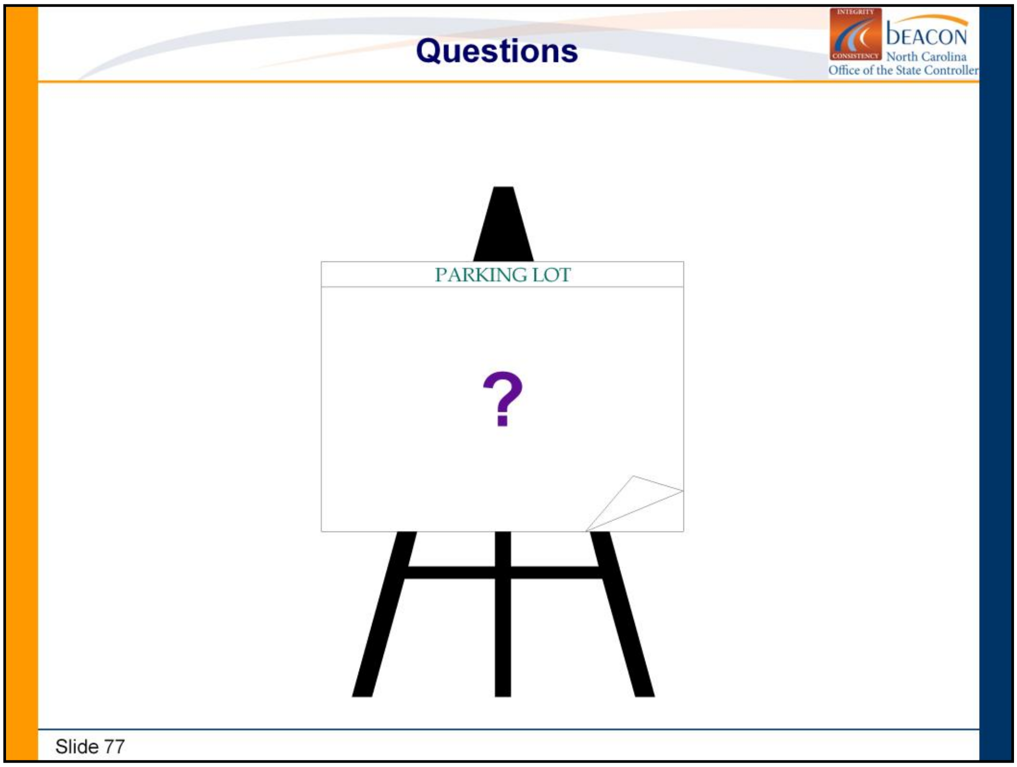
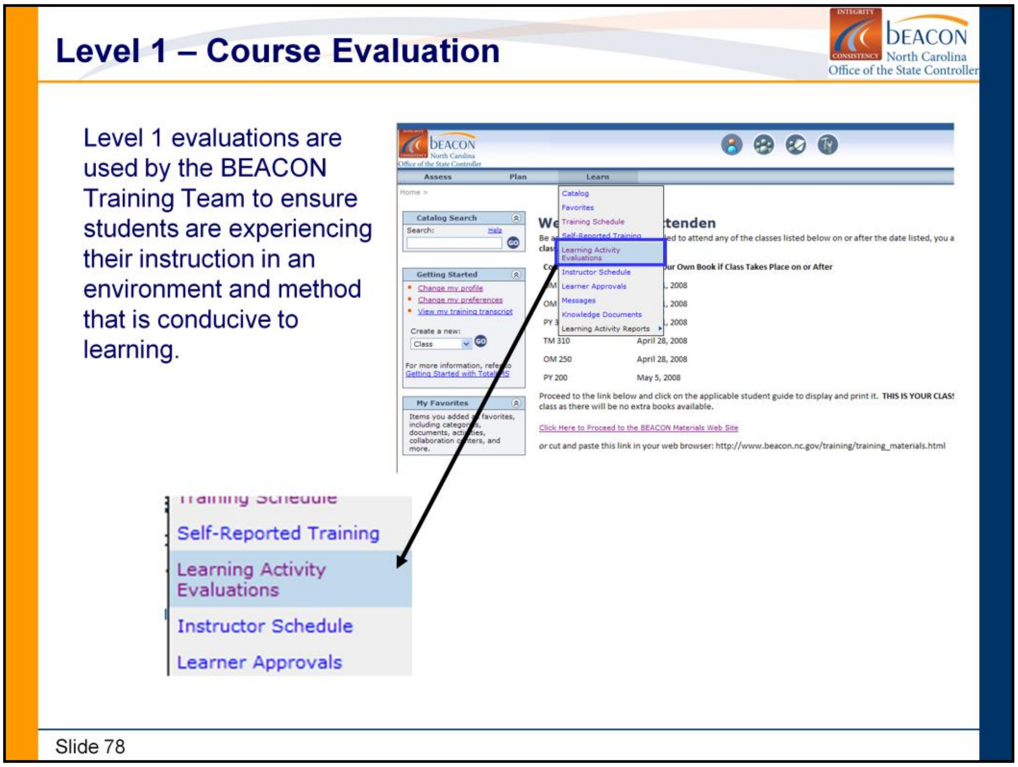
Notes


Course Objectives
BEACON
North Carolina
Office of the State Controller
In this course you learned to:
– Explain the Workflow process for Personnel Administration (PA) and Organizational Management (OM)
– Identify key differences in the routing of Workflow Items in OM and PA
– Access, navigate and complete items with the Workflow Inbox
– Use key features to manage OM/PA Workflow Items
– Execute reports
Slide 76

Notes


Questions
BEACON
North Carolina
Office of the State Controller
PARKING LOT
?
Slide 77

Notes



Notes

Level 1 Evaluations

The Level 1 evaluation classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

Next Steps

- Monitor BEACON communication
  - BEST Shared Services web site (especially the Updates tab)
    - URL: http://www.ncosc.net/BEST/
  - BEACON Training website: **What's New** link
    - URL: http://www.beacon.nc.gov/training/whats_new.html
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
    - URL: http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
    - URL: https://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password

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Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.


BEACON
North Carolina
Office of the State Controller
CONGRATULATIONS
You have completed the course
Please complete your course evaluation!
Slide 80

Notes